

COMMERCE

Index To Volume 125 (July To September 1972)

	PAGE		PAGE		PAGE
A		AVIATION		BANKS	
AGRICULTURE, FOOD AND ANIMAL HUSBANDRY		Airlines—JAL makes money while others lose	508	American Express Company	475
Brighter crop picture	493	Growth of Air Cargo (Supplement, August 26)		Andhra Bank Ltd	236, 245
Ceilings—Not hilly for land reforms	443	(i) An aid for exports	1	Bank of Baroda	133
Concessions to Tamil Nadu farmers	260	(ii) Aerodromes in India	3	Bank of India	344, 477, 525
Curb on land speculation	377	(iii) Air cargo agencies	7	Bank of Maharashtra	660, 661
Drought—Loss of 20 million tonnes of foodgrains	380	(iv) Need to utilise potential	5	Bareilly Corporation (Bank) Ltd	886
Drought—Rs 26-crore p'an to fight damages	443	Rescuing Dum Dum?	552	Canara Bank	660, 661
Fancy food planning	73	Some respite for Indian Airlines	676	Central Bank of India	477, 525
For rural welfare	749			Dena Bank	660, 661
Greater integration of industry and agriculture in the Fifth Plan (West Bengal—A Survey, August 5)	12	B		First National City Bank	170
Hurdles in farm financing	790	BALANCE SHEETS		Hindustan Commercial Bank Ltd	245
Kharif crop prospects improve	760	Bank of India	352-355	Karur Vysya Bank Ltd	810
Land ceilings: A realistic way out	264	First National City Bank	170-172	Lakshmi Vilas Bank Ltd	886
Land ceilings: Pandora's box for Congress	153	The Andhra Bank Ltd	236-239	Punjab National Bank	640
Maharashtra: No agricultural land for rich non-agriculturists	382	BANGLADESH		State Bank of Saurashtra	662
Mysore: Land only for cultivators	382	A game of neutralisation?	264	Syndicate Bank	118, 133
Narmada—Waiting for PM's Award	259	Anti-Indian elements	561	Union Bank of India	660, 661
Narmada accord—End of inter-State rivalry	264	Imports to fight price rise	561	United Bank of India	660, 661
National policy on water?	73	Jute—Competition from Bangladesh	816	Vijaya Bank Ltd	810
Ominous dry spell	403	Smuggling—Bangladesh border to be sealed	633		
Planters' worry	563	Synthetics—A common danger to India and Bangladesh	265	BOOKS, PUBLICATIONS	
Rabi crop and imports	376	Waiting for China trade?	327	Agricultural Planning and Co-operatives	409
Spectre of scarcity	322			Banking Regulation Act—1949	173
South-west monsoon satisfactory	164	BANKING AND MONEY		Coated and Laminated Jute	341
Tamil Nadu farmers' dispute	148	Asian Development Bank—India's increased contribution	559	Comparative Business and Non-business Administration	873
Tamil Nadu—No longer a farmers' stir	154	Bank of India—Shift towards rural areas	845	Cotton International 1972	231
The challenge of scarcity	315	Bank statistics—Return simplified; but not quite	509	Directory of Technical and Engineering Services in India	409
Tractor imports for whom?	562	Credit deposit ratio low	388	Doctors and Dukuns, Puppets and Pills: A Look at Indonesia's Family Planning Programme	517
		Hurdles in farm financing	790	Dynamic Management—Research and Development	579
AGRICULTURE, FOOD AND ANIMAL HUSBANDRY II		IBRD—A friend of India	744	Economics of Public Expenditure	91
5-years of Independence (A Survey, August 19)		IMF and the poor world	675	Essays in Planning and Growth by J. J. Anjaria	516
(i) Correction of imbalances in production basket	37	IMF—proposals for reform	626	Evaluation of Land Reform (Vol. 1—General Report)	465
(ii) Diversification of agriculture	32	IMF Report 1972—How to restore the Fund's authority?	716	Exploration in Marketing Thought	231
(iii) Institutional change, agricultural production and rural poverty	40	Money shops—Control on lending rates	758	Financial Planning and Control	639
TOMOBILES		More banking funds in long-dateds	250	Forecasting, Planning and Budgeting for Marketing	279
Automobile dealers' margin	15	No policy against inflation	316	Indian Agriculture in Brief (11th ed.)	173
Commercial vehicles—Telco's expansion plans	217	RBI Annual Report—Need for curbing monetary expansion	720	Long Term Planning for Agriculture in Nepal	279
TOMOBILE COMPANIES		World Bank 1972—India and the World Bank	775	Management of Corporations	30
Ajaj Auto Ltd	806	World Bank Report—Serious debt difficulties ahead for developing countries	777	Manorama Yearbook 1972	91
Motor Industries Co Ltd	416			Modern Banking Theory	231
Auto Engineering and Locomotive Co Ltd	226, 360			Mysore State Road Transport Corporation Review (Quarterly)	409
				Practical Politics in the United States	91
				Public Debt and Economic Development in India	579
				Regional Development Banking	341
				Statistical Bulletin on Cement Production and Despatches for the Year 1971	341

PAGE

PAGE

PAGE

BOOKS, PUBLICATIONS—contd.

Tax Burden on Agriculture in India (An Enquiry into the Feasibility of Agricultural Income Tax) ...	579
Technical Studies Prepared for the Banking Commission, Volumes 1 & 2 ...	517
The Eastern Metals Review Annual Number 1972 ...	30
The Fourth Plan Mid-term Appraisal Trading with the World—Country Profiles ...	703
Without Marx or Jesus—The New American Revolution ...	279
World Dynamics ...	637
	799

BUSINESS OPINION

Appointment of auditors ...	505
Automobile dealers' margin ...	15
Bonus: Disturbing implications ...	843
Cess on power pumps ...	563
Chemical exports ...	389
Coal prices ...	691
Companies' Act amendment ...	449
Company Law amendment ...	691
Component export to Japan ...	273
Costly metals ...	161
Drug units' woes ...	273
Edible oil prices ...	449
Export damper ...	755
Export obligation ...	629
Fertiliser shortage ...	81
Fostering joint sector ...	273
Gem exports ...	505
Holding the price-line ...	505
Hotels for tourists ...	843
8.33 per cent bonus ...	755
IISCO take-over ...	217
Import replenishment ...	389
Import substitution ...	217
Inadequate subsidy ...	329
Incomes policy ...	691
Industrial fasteners' requirements ...	563
Jewellery exports ...	843
Madhya Pradesh textile units' woes ...	329
Man-made fibres production ...	629
Need for new mills ...	843
Optimum capacity utilisation ...	15
Planters' worry ...	563
Power crisis in Punjab ...	691
Powerloom weavers' woes ...	449
Price fixation ...	161
Shipping lines' conduct ...	389
Solution to social evils ...	81
Steel products supply ...	449
Streamlining SRP ...	329
Tackling power shortage ...	629
Tea exports ...	691
Textile industry's woes ...	563
West Bengal's ills ...	161
Wider tax net ...	15
Wood pulp imports ...	81
Woollen industry's plea ...	329

C**CASHEW**

Cashew Corporation of India Ltd ...	300
-------------------------------------	-----

CEMENT

Shrinking cement ...	192
----------------------	-----

CEMENT COMPANIES

Cement Corporation of India Ltd ...	887
Dalmia Cement (Bharat) Ltd ...	126, 808
India Cement Ltd ...	654, 864
Orissa Cement Ltd ...	130
Shree Digvijay Cement Company Ltd ...	108
Travancore Cements Ltd ...	524

CHAIRMEN'S SPEECHES

Aluminium Industries Ltd ...	856
Association of Man-made Fibre Industry, Bombay ...	96
Bengal Paper Mill Co Ltd ...	106
Bharat Heavy Electricals Ltd ...	24
Binny Ltd ...	114
Blue Star Ltd ...	52
Cashew Corporation of India Ltd ...	300
Chowgule Steamships Ltd ...	874
Electronics Corporation of India Ltd ...	648
General Electric Company of India Ltd ...	458
Gujarat Steel Tubes Ltd ...	652
Indabrator Ltd ...	112
India Cement Ltd ...	864
India Steamship Company Ltd ...	876
India Tobacco Company Ltd ...	466
Indian Oil Corporation Ltd ...	802
Indian Organic Chemicals Ltd ...	704
Indian Sugar Mills Association ...	110
Indo-Burma Petroleum Company Ltd ...	94
Industrial Finance Corporation of India Industrial Reconstruction Corporation of India Ltd ...	850
Jay Engineering Works Ltd ...	784
Kirloskar Oil Engines Ltd ...	602
Life Insurance Corporation of India ...	712
Madras Aluminium Company Ltd ...	708
Mahindra Ugin Steel Company Ltd ...	124
Mettur Chemical and Industrial Corporation Ltd ...	38
Minerals and Metals Trading Corpo- ration of India Ltd ...	338
Mukand Iron & Steel Works Ltd ...	859
	590
National Industrial Development Cor- poration Ltd ...	860
New Standard Engineering Company Ltd ...	858
Nirlon Synthetic Fibres and Chemi- cals Ltd ...	878
Polychem Limited ...	650
Poysha Industrial Company Ltd ...	589
Premier Tyres Ltd ...	646
Ramon & Demm Ltd ...	889
Sandur Manganese & Iron Ores Ltd ...	28
Seshasayee Paper and Boards Ltd ...	862
Shree Digvijay Cement Company Ltd ...	92
Shreenivas Cotton Mills Ltd ...	41
SIMCO Meters Ltd ...	854
South India Shipping Corporation Ltd ...	174
South India Viscose Ltd ...	180
South Madras Electric Supply Corpo- ration Ltd ...	701
State Trading Corporation of India Ltd ...	462
Straw Products Ltd ...	92
Tata Engineering and Locomotive Company Ltd ...	226
Tata Iron and Steel Company Ltd ...	280
Tata Oil Mills Company Ltd ...	232
Tata Power Company Ltd ...	698
Unit Trust of India ...	669
Western India Plywoods Ltd ...	890
Widia (India) Limited ...	26

CHEMICAL COMPANIES

Cellulose Products of India Ltd ...	88
Colour-Chem Ltd ...	414, 424
East India Pharmaceutical Works Ltd ...	21
Herdillia Chemicals Ltd ...	31
Indian Organic Chemicals Ltd ...	71
Indian Dyestuff Industries Ltd ...	44
Indo Solex Ltd ...	61
J. K. Chemicals Ltd ...	11
Mettur Chemical and Industrial Corporation Ltd ...	338, 88
Polychem Ltd ...	474, 650, 66
Tata-Fison Industries Ltd (Ambattur Supplement, July 1) ...	

CHEMICALS AND PHARMACEUTICALS

Basic problems for increasing fertiliser Consumption during the seventies ...	66
Chemical exports ...	33
Chemexil Award for Indian Dyestuff Industries Ltd (Supplement August 12) ...	
(i) IDI in the chemical world ...	
(ii) Promoting exports of dyestuffs ...	xv
Drug units' woes ...	22
Fertilisers—Nangal to switch over to fuel oil ...	77
Fertiliser consumption—Rising trend sets problems ...	66
Fertilisers—Self-sufficiency still far away ...	44
Fertiliser shortage ...	
Paints and varnishes (Supplement, July 8) ...	
(i) Advances in varnish technology ...	
(ii) Paints and varnishes: A profile ...	
(iii) The growth of paint industry ...	
Setback for chemicals ...	88
SIDCO sets up chemical and elect- ronic cell ...	77

COAL

Coal prices ...	66
Costlier coal ...	88
Paltry compensation for coking coal mines ...	70
Search for coke ...	77
Take-over of non-coking coal mines ...	44

COFFEE

Coffee agreement saved? ...	66
Coffee for USSR ...	44

COIR

All-time high in coir ...	44
Push for coir ...	66
Solution lies in modernisation ...	

COMMERCE RESEARCH BUREAU'S STUDIES**At a Glance**

Closed cotton textile mills ...	
---------------------------------	--

COMMERCE RESEARCH BUREAU'S STUDIES—contd.

Private sector

Financial analysis of operations

Ahmedabad Cotton Manufacturing Co Ltd	182, 183
Ahmedabad Electricity Co Ltd	654, 655
At Mills Ltd	240, 241
Andhra Bank Ltd	245, 245
Andhra Valley Power Supply Co Ltd	722, 723
Andrew Yule and Co Ltd	356, 357
Ananday Mills Ltd	240, 241
Arher Textiles Ltd	44, 45
As Cycle Industries	44, 45
Ajay Auto Ltd	806, 807
Ajay Electricals Ltd	470, 471
Ammer Lawrie & Co Ltd	286, 287
Anarhat Tea Co Ltd	470, 471
Arreilly Corporation (Bank) Ltd	886
Asanti Cotton Mills Ltd	240, 241
Asco Engineering Co Ltd	470, 471
Asapur Sugar & Allied Industries Ltd	182, 183
Asal Flour Mills Co Ltd	44, 45
Asal National Textile Mills Ltd	470, 471
Asal Paper Mill Co Ltd	356, 357
Asarat Steel Tubes Ltd	520, 521
Asartia Electric Steel Co Ltd	44, 45
Asari Mills Ltd	356, 357
Asani Metal Works Ltd	654, 655
Asany Ltd	240, 241
As Star Ltd	45, 46
Asnabay Paints & Allied Products Ltd	470, 471
Asnabay Suburban Electric Supply Ltd	520, 521
Aswreah Cotton Mills Company Ltd	46, 47
Asdge and Roof Co (India) Ltd	182, 183
Asannia Biscuit Co Ltd	182, 183
Asatish India Corporation Ltd	240, 241
Asamah-Shell Refineries Ltd	182, 183
Asole Corporation of India Ltd	242, 243
Ascutta Steel Co Ltd	722, 723
Asulose Products of India Ltd	806, 807
Asutury Enka Ltd	242, 243
Aswagule Steamships Ltd	880, 881
Asour-Chem Ltd	414, 415
Asninco Binani Zinc Ltd	356, 357
Asnmercial Ahmedabad Mills Co Ltd	286, 287
Asmia Cement (Bharat) Ltd	126, 127
Asrangere Cotton Mills Ltd	880, 881
Asrid Brown Greaves Ltd	520, 521
Asnbar Mills Ltd	46, 47
Asnican Brothers and Co Ltd	126, 127
As India Pharmaceutical Works Ltd	286, 287
Asntern Manufacturing Co Ltd	242, 243
Asneering Construction Co Ltd	470, 473
Aslish Electric Company of India Ltd	472, 473
Asports Ltd	46, 47
Asports Tractors Ltd	47, 48
Asela Batteries Ltd	880, 881
Aserglass Pilkington Ltd	806, 807
Ased Specialities Ltd	286, 287
Askwar Mills Ltd	242, 243
Aseral Industrial Society Ltd	184, 185
Asfrey Phillips India Ltd	242, 243
Asetze (India) Ltd	47, 48
Asdlass Nerolac Paints Ltd	414, 415
Asdyar India Ltd	472, 473
Asat Eastern Shipping Co Ltd	880, 881
Asaves Cotton and Co Ltd	520, 521
Asarat Steel Tubes Ltd	521, 522
Asalior Rayon Silk Mfg (Wvg) Co Ltd	722, 723

COMMERCE RESEARCH BUREAU'S STUDIES—contd.

Harinagar Sugar Mills Ltd	356
Herdillia Chemicals Ltd	358, 359
Hind Rectifiers Ltd	723, 724
Hindustan Spg & Wvg Mills Ltd	723, 724
Hindustan Commercial Bank Ltd	245
Hindustan Sanitaryware & Industries Ltd	724, 725
Hooghly Flour Mills Co Ltd	594, 595
India Cements Ltd	654, 655
India Steamship Company Ltd	881, 882
India Tobacco Co Ltd	286, 287
India United Mills Ltd	654, 655
Indian Dyestuff Industries Ltd	655, 656
Indian Hotels Co Ltd	288, 289
Indian Metals and Ferro Alloys Ltd	414, 415
Industrial Cables (India) Ltd	184, 185
Industrial Containers Ltd	184, 185
International Tractor Company of India Ltd	724, 725
Jay Engineering Works Ltd	656, 657
Jay Shree Tea & Industries Ltd	725, 726
Jaya Shree Textiles and Industries Ltd	414, 415
Johnston Pumps India Ltd	594, 595
Jyoti Ltd	882, 883
J.K. Chemicals Ltd	126, 127
J.K. Synthetics Ltd	415, 416
Kamala Mills Ltd	656, 657
Kamarhatty Co Ltd	472, 473
Kanknarrah Co Ltd	184, 185
Karanpura Collieries Ltd	656, 657
Kohinoor Mills Co Ltd	127, 128
Kosmek Plastics Manufacturing Ltd	185, 186
Kumardhubi Engineering Works Ltd	656, 657
Lakme Ltd	288, 289
Lakshmi Mills Co Ltd	472, 473
Lakshmi Vilas Bank Ltd	886
Larsen & Toubro Ltd	522, 523
Macneill & Barry Ltd	416, 417
Madras Aluminium Co Ltd	358, 359
Mafatlal Fine Spinning & Manufacturing Company Ltd	288, 289
Maharaja Shree Umair Mills Ltd	523, 524
Mahendra Mills Ltd	594, 595
Mahindra Uguine Steel Co Ltd	127, 128
Malwa Vanaspati & Chemical Co Ltd	594, 595
Marsden Spinning & Manufacturing Co Ltd	594, 595
Metal Box Company of India Ltd	186, 187
Metal Distributors Ltd	186, 187
Mettur Chemical & Industrial Corporation Ltd	806, 807
Modella Woollens Ltd	128, 129
Monogram Mills Company Ltd	596, 597
Motor Industries Co Ltd	416, 417
Mukand Iron and Steel Works Ltd	725, 726
Mysore Acetate & Chemicals Co Ltd	596, 597
Nagri Mills Co Ltd	358, 359
National Rubber Manufacturers Ltd	289, 290
National Tobacco Co of India Ltd	358, 359
Navjivan Mills Ltd	128, 129
New City of Bombay Manufacturing Co Ltd	48, 49
New Commercial Mills Company Ltd	416, 417
New India Industries Ltd	128, 129
New Shorrock Spg & Mfg Co Ltd	128, 129
New Standard Engineering Co Ltd	417, 418
New Swadeshi Mills of Ahmedabad Ltd	882, 883
Nimar Textiles Ltd	725, 726
Nuddea Mills Co Ltd	359, 360
Orissa Cement Ltd	129, 130

COMMERCE RESEARCH BUREAU'S STUDIES—contd.

Permanent Magnets Ltd	289, 290
Podar Silks and Synthetics Ltd	130, 131
Polychem Ltd	657, 659
Premier Mills (ebe) Ltd	523, 524
Premier Tyres Ltd	807, 808
Pudumjee Pulp and Paper Mills Ltd	360, 361
Radha Krishna Mills Ltd	130, 131
Raja Bahadur Motilal Mills Ltd	48, 49
Rajalakshmi Mills Ltd	290, 291
Rajkumar Mills Ltd	360, 361
Rane (Madras) Ltd	726, 727
Ratnakar Shipping Co Ltd	882, 883
Raymond Woollen Mills Ltd	130, 131
Rustom and Hornsby (India) Ltd	596, 597
Sahu Minerals and Properties Ltd	523, 524
Sandur Manganese and Iron Ores Ltd	360, 361
Seshasayee Industries Ltd	417, 418
Seshasayee Paper & Boards Ltd	883, 884
Shaw Wallace & Co Ltd	596, 597
Shreenivas Cotton Mills Ltd	49, 50
Shree Ram Mills Ltd	186, 187
Simplex Mills Co Ltd	727, 728
Sir Shadi Lal Sugar and General Mills Ltd	131, 132
South India Shipping Corporation Ltd	290, 291
South India Viscose Ltd	49, 50
Standard Batteries Ltd	418, 419
Steel Containers Ltd	186, 187
Straw Products Ltd	418, 419
Surat Electricity Co Ltd	290, 291
Sutlej Cotton Mills Ltd	883, 885
Swan Mills Ltd	186, 187
Tata Engineering and Locomotive Co Ltd	360, 361
Tata Hydro-Electric Power Supply Co Ltd	727, 728
Tata Iron and Steel Co Ltd	419, 420
Tata Merlin and Gerin Ltd	419, 420
Tata Oil Mills Company Ltd	291, 293
Tata Power Co Ltd	727, 728
Textile Machinery Corporation Ltd	131, 132
Tezpur Tea Co Ltd	597, 598
Titaghar Paper Mills Co Ltd	884, 885
Travancore Cements Ltd	523, 524
Travancore Rayons Ltd	727, 728
Union Carbide India Ltd	291, 293
Vasanta Mills Ltd	361, 362
Vegetable Products Ltd	598
Western India Plywoods Ltd	598, 599
West Bokaro Ltd	419, 420
Williamson Magor & Co Ltd	49, 50
Zenith Steel Pipes Ltd	884, 885

In the market

Andhra Sugars Ltd	527
Anil Steel & Industries Ltd	885
Bharat Commerce and Industries Ltd	189
Britelite Carbons Ltd	362
Eurokote (India) Ltd	475
General Electric Company of India Ltd	421
Indo Solex Ltd	659
JG Glass Ltd	729
Jotindra Steel & Tubes Ltd	189
Khemka Plantations Ltd	729

	PAGE
COMMERCE RESEARCH BUREAU'S STUDIES—contd.	
Madras Modern Builders Ltd ...	475
Platewel Processes & Chemicals Ltd	524
Punjab Tractors Ltd ...	527
Tanfort Tyres Ltd ...	888
Vidarbha Glass Works Ltd ...	475
<i>Other developments</i>	
American Express Company ...	475
Amphetronix Ltd ...	51
Blue Star Ltd ...	189
Ceat Tyres of India Ltd ...	885
Central India Spg Wvg & Mfg Co Ltd	728
Choksi Tube Company Private Ltd ...	50
Colour-Chem Ltd ...	474
Dalmia Cement (Bharat) Ltd ...	808
Dempo Steamships Ltd ...	808
English Electric Company of India Ltd	51
Ganges Manufacturing Company Ltd	808
Garware Nylons Ltd ...	474
General Electric Co of India Ltd ...	51
Greaves Cotton & Company Ltd ...	474
Gwalior Rayon Silk Mfg (Wvg) Co Ltd	420
Harbans Lal Malhotra & Sons (Pvt) Ltd ...	135
Hindustan Brown Boveri Ltd ...	474
Hindustan Ferodo Ltd ...	474
Hindustan Lever Ltd ...	599
Hindustan Sanitaryware & Industries Ltd ...	51
Indian Dyestuff Industries Ltd ...	474
Industrial Credit and Investment Corporation of India Ltd ...	189
Jay Shree Tea & Industries Ltd ...	474
Kothari Sugars & Chemicals Ltd ...	244
Kunal Engineering Company Ltd ...	808
Larsen & Toubro Ltd ...	244
Madhya Pradesh Electricals Ltd ...	728
Metal Box Company of India Ltd ...	809
Multi-Weld Wire Company Pvt Ltd	474
New Standard Engineering Co Ltd	135
Philips India Ltd ...	599
Polychem Ltd ...	474
Premier Tyres Ltd ...	244
Rathi Alloys and Steel Ltd ...	808
Raymond Woollen Mills Ltd ...	51
Rustom Jehangir Vakil Mills Co Ltd	475
SLM-Maneklal Industries Ltd ...	189
Shree Shakti Mills Ltd ...	729
Shree Vallabh Glass Works Ltd ...	362
Simplex Mills Co Ltd ...	244
Stewarts and Lloyds of India Ltd ...	421
Tata Engineering and Locomotive Company Ltd ...	244
Tata Iron & Steel Co Ltd ...	474
Tata Oil Mills Company Ltd ...	135
Tensile Steel Ltd ...	244
Universal Steel & Alloys Ltd ...	599
Zenith Steel Pipes Ltd ...	474
Economic studies	
Composition of our population ...	42
Industrial economy of West Bengal (West Bengal—A Survey, August 5)	2
Steel price rise: A half-hearted step	269
World Bank 1972—India and the World Bank ...	775

COMMERCE RESEARCH BUREAU'S STUDIES—contd.	
Miscellaneous studies	
Drought—Loss of 20 million tonnes of foodgrains ...	380
Monsoon, crop and commodity surveys	
Kharif crop prospects improve (August 1972 Survey) ...	760
Ominous dry spell (July 1972 Survey)	403
South-west monsoon satisfactory (July 1972 Survey) ...	164
Public sector	
<i>Financial analysis of operations</i>	
Bank of Baroda ...	133
Bank of India ...	525
Bank of Maharashtra ...	660, 661
Canara Bank ...	660, 661
Cement Corporation of India Ltd ...	887
Central Bank of India ...	525
Dena Bank ...	660, 661
Ganganagar Sugar Mills Ltd ...	476
Heavy Engineering Corporation Ltd ...	887, 888
Hindustan Antibiotics Ltd ...	476, 477
Indian Oil Corporation Ltd ...	811
Indian Oil International Ltd ...	811, 813
Indian Telephone Industries Ltd ...	188
Mining and Allied Machinery Corporation Ltd ...	188
Modern Bakeries (India) Ltd ...	247
Mysore Chrome Tanning Co Ltd ...	363
Mysore Cosmetics Ltd ...	363
National Mineral Development Corporation Ltd ...	600
Nizam Sugar Factory Ltd ...	247
Pyrites, Phosphates and Chemicals Ltd ...	600, 601
Syndicate Bank ...	133
Union Bank of India ...	660, 661
United Bank of India ...	660, 661
<i>Other developments</i>	
Bank of India ...	477
Central Bank of India ...	477
Deposit Insurance Corporation ...	662
Industrial Development Bank of India (IDBI) ...	601
National Chemical Laboratory—PEX AND PAX ...	477
State Bank of Saurashtra ...	662
Spotlight on industries	
IISCO take-over: The background ...	222
Statistical studies	
Economic statistics for a quarter century of independence (25 Years of Independence—A Survey, August 19)	115
West Bengal: A statistical profile (West Bengal—A Survey, August 5)	75

COMPANY AFFAIRS

Companies' Act—A far-reaching transformation ...	4
Companies' Act amendment ...	4
Company Law amendment ...	6
Company Law—Further amendments in the offing ...	5
Radical company legislation ...	4

COTTON

Cotton: Record carry-over ...	6
Cotton: Ready for monopoly scheme	2
Procurement of cotton? ...	4
Worry for Bengal Deshi ...	7

CULTURAL DIARY

A Canadian nartaki ...	5
A secular genius ...	1
A film about Auroville ...	4
Davierwalla—sculptor ...	2
Film Institute reform ...	...
Idols in the dust ...	2
Shivendra Sinha's "Phir Bhi" ...	2
The world of M. F. Husain ...	...

CURRENCY AND EXCHANGE

Dollar's small gesture ...	...
Echoes of pound float ...	...
HK\$: Off the sterling hook ...	...
India's burden of foreign debt ...	...
Last nails on sterling area coffin ...	...
Money shops—Control on lending rates	...
Pound float and the rupee ...	...
Pound float—Real threat to parity structure ...	...
Pound float—Will it free American hands? ...	...
The devaluation of pound sterling	...
The Western monetary crisis again	...
What is meant by floating a currency?	...

D**DOCUMENTS**

FAO review of world agriculture ...	...
IMF Report 1972—How to restore the Fund's authority? ...	...
RBI Annual Report: Need for curbing monetary expansion ...	...
Simla agreement between India and Pakistan ...	...
Tata memorandum on industrial growth	...
World Bank 1972—India and World Bank ...	...
World Bank—McNamara: Growth for the poorest of the poor world	...
World Bank Report—Serious debt difficulties ahead for developing countries ...	...

PAGE	PAGE	PAGE
E	EDITOR'S NOTEBOOK—Contd.	ELECTRICITY, ATOMIC ENERGY, CABLES AND COMMUNICATIONS—contd.
EDITOR'S NOTEBOOK	Puri (K. R.) takes charge as chairman of LIC ... 619	(v) Unhealthy reliance on foreign knowhow ... iii
A news agency reporter's unique feat ... 151	Repression in Czechoslovakia ... 439	Maharashtra—Lesser and costlier power ... 832
A short history of the Communist Party of the Soviet Union: The new version ... 555	Restoration of material incentives in China ... 379	Power—A task force maintenance? ... 690
Banglar Doot story: Freedom of the press ... 263	Silver Jubilee celebrations of our Independence ... 439	Power—Beginnings of a national grid ... 558
Bharatiya culture: Shadow and substance ... 263	Simla summit: A watershed in the 25-year-old fratricidal confrontation between India and Pakistan ... 151	Power crisis in Punjab ... 691
Bishnu Dey ... 207	Solzhenitsyn ... 619	Power crisis—Making a scapegoat of local manufacturers ... 16
Bombay University: Discipline, morality, propriety ... 495	Swatantra Party resolutions: An essay in economic schizophrenia ... 67	Power hungry West Bengal ... 445
British Labour Party's opportunistic silence ... 619	Technological revolution for whom? The new malaise: "Let Indiraji decide" ... 747	Power—Shortfall of 2 million kw in Plan target ... 15
British weeklies: The conscience of the British people ... 439	The plight of Harijans and <i>Bandh</i> ... 7	Rajasthan Atomic Station—Power for hungry North ... 748
Bureaucracy and the tragedy of Indian economic development ... 679	The style of Mrs Gandhi's political leadership ... 747	Tackling power shortage ... 629
Centre-State relations and the game of capturing and retaining power: K. N. Raj accuses ... 263	Transfer of resources to urban areas: Need of an enquiry ... 555	Take-over of private power units ... 152
Chancellor Brandt and the fight against inflation in Germany ... 151	United States unanimously salutes the 25th anniversary of India's Independence ... 439	Tamil Nadu—A cut of 25 per cent ... 832
Charu Mazumdar ... 319	Ustad Alauddin Khan ... 679	Telephones—Constraints on expansion ... 451
Coca-Cola advertisement in <i>New Age</i> : A tail-piece ... 495	Witch hunt by Congress against opposition parties? ... 831	ENGINEERING
Communist China: New, hesitant liberal trend ... 319	ELECTRIC, CABLES AND RADIO COMPANIES	Aluminium—Hindalco's idle capacity ... 565
CPI agitation against the Government's economic policies and the Kerala coalition ministry ... 747	Ahmedabad Electricity Co Ltd ... 654	Ball and roller bearings industry (Supplement, July 15)
Czechoslovaks defy police order ... 555	Andhra Valley Power Supply Co Ltd ... 722	(i) Achievements and goals ... i-vii
Dhebar on the standard of behaviour for politicians ... 679	Bajaj Electricals Ltd ... 470	(ii) Rapid progress in production ... viii
Drive towards professionalisation—its extension ... 7	Bharat Heavy Electricals Ltd ... 24	Earthmoving equipment—Grounded by shortage of spare parts ... 83
Extending the area of the public sector ... 319	Bombay Suburban Electric Supply Ltd ... 520	Industrial and power boilers (Supplement, September 23)
Foreign Trade Ministry and foreign trade statistics delays ... 319	Cable Corporation of India Ltd ... 242	(i) Importance of maintenance ... 791
India's performance at the Olympic games ... 678	Electronics Corporation of India Ltd ... 648	(ii) Industrial and power boilers: A profile ... 793
Indulal Yagnik ... 207	English Electric Company of India Ltd ... 51, 472	(iii) Major manufacturers ... 798
Jayaprakashji on the concentration of power in one hand ... 747	General Electric Co of India Ltd ... 51, 421, 458	(iv) Packaged boilers ... 795
Jayaprakashji on the erosion of the spirit of austerity in Independent India ... 555	Greaves Cotton & Co Ltd ... 474, 520	(v) Power station boilers ... 795
Jayaprakashji's unsolicited advice ... 495	Industrial Cables India Ltd ... 184	(vi) Steel pipes and tubes for boilers ... 797
Justice of the Peace title—A political bounty ... 495	Philips India Ltd ... 599	Pipes and tubes industry (Supplement, July 19)
Let freedom ring: The resounding cheer for the Silver Jubilee of Independence celebrations ... 439	SIMCO Meters Ltd ... 854	(i) Growing demand for PVC pipes ... v-vii
Literary journals and the lack of advertisement support ... 7	South Madras Electric Supply Corporation Ltd ... 701	(ii) Major manufacturers ... vii
Militant protests, rule of law and democracy ... 7	Surat Electricity Co Ltd ... 290	(iii) Pipes and tubes: A profile ... iii
More journalistic freedom in Bombay? Munich Olympics carnage ... 619	Tata Hydro Electric Power Supply Co Ltd ... 727	(iv) Steel pipes: Growth problems ... i-v
Norway keeps out of ECM ... 831	Tata Power Co Ltd ... 698, 727	The State of West Bengal: A Survey, August 15
Plight of Uganda Indians ... 379	ELECTRICITY, ATOMIC ENERGY, CABLES AND COMMUNICATIONS	(i) Bright outlook for engineering industry ... 41
Prasanta Chandra Mahalanobis ... 67	Energy: Problems and prospects (25 Years of Independence, A Survey, August 19) ... 77	(ii) Export potential of small-scale sector ... 59
President Nyerere on Idi Amin's atrocious behaviour ... 555	—Entertainment electronics (Supplement September 16)	(iii) Need for bold reorganisation of engineering industry ... 45
Private sector, Chambers of Commerce and social conscience ... 379	(i) Entry into sophisticated fields ... v-vii	(iv) Small-scale sector needs nursing ... 57
Problem of Centre-State financial relations in Australia ... 67	(ii) Marketing of radio receivers ... i-v	Steel wires and ropes (Supplement, July 1)
Problem of pollution and Mahatma Gandhi's economic thought ... 207	(iii) Problems of components industry ... vi-vii	(i) Constraint on development ... 31-32
	(iv) Radio receivers industry: A profile ... iii	(ii) Large unutilised capacity ... 31-35
		(iii) Steel wires and ropes: A profile ... 33
		Telco's expansion plans ... 217
		Tisco expansion—A plea for Japanese consultants ... 504
		Welding equipment and electrodes (Supplement, July 22)
		(i) Major manufacturers ... vii
		(ii) New challenges to the industry ... i-v
		(iii) Profile—Welding equipment and electrodes ... iii
		(iv) Surfacing methods ... v-vi

PAGE

ENGINEERING COMPANIES

Ahmedabad Electricity Co Ltd	654
Aluminium Industries Ltd	856
Andhra Valley Power Supply Co Ltd	722
Andrew Yule and Co Ltd	356
Anil Steel & Industries Ltd	885
Atlas Cycle Industries Ltd	44
Bajaj Auto Ltd	806
Bajaj Electricals Ltd	470
Beco Engineering Co Ltd	470
Bharat Steel Tubes Ltd	520
Binani Metal Works Ltd	654
Binny Ltd (Engineering Division)	114, 240
Blue Star Ltd	45, 189
Bombay Suburban Electricity Supply Ltd	520
Bridge and Roof Co (India) Ltd	182
Cable Corporation of India Ltd	242
Calcutta Steel Co Ltd	722
Choksi Tube Company Private Ltd	50
Cominco Binani Zinc Ltd	356
David Brown Greaves Ltd	520
Electronics Corporation of India Ltd	648
Engineering Construction Co Ltd	470
English Electric Company of India Ltd	51, 472
Escorts Ltd	46
Escorts Tractors Ltd	47
Estrela Batteries Ltd	880
General Electric Company of India Ltd	51, 421, 458
General Industrial Society Ltd	184
Goteze (India) Ltd	48
Greaves Cotton and Company Ltd	474, 520
Gujarat Steel Tubes Ltd	522, 652
Harbans Lal Malhotra & Sons	135
Heavy Engineering Corporation Ltd	888
Hind Rectifiers Ltd	724
Hindustan Brown Boveri Ltd	474
Hindustan Ferodo Ltd	474
Indabrador Ltd	112
Indian Metals and Ferro Alloys Ltd	414
Industrial Cables (India) Ltd	184
Industrial Containers Ltd	184
Indian Telephone Industries Ltd	188
International Tractor Company of India Ltd	724
Jay Engineering Works Ltd	602, 656
Johnston Pumps India Ltd	594
Jotindra Steel & Tubes Ltd	189
Jyoti Ltd	882
Kirloskar Oil Engines Ltd	712
Kumardhubi Engineering Works Ltd	656
Kunal Engineering Company Ltd	808
Larsen & Toubro Ltd	244, 522
Mahindra Ugine Steel Company Ltd	38
Macneil & Barry Ltd	416
Madhya Pradesh Electricals Ltd	728
Madras Aluminium Co Ltd	124, 358
Madras Modern Builders Ltd	475
Metal Box Company of India Ltd	186, 809
Mining and Allied Machinery Corporation Ltd	188
Motor Industries Co Ltd	416
Mukand Iron & Steel Works Ltd	590, 726
Multiweld Wire Company Pvt Ltd	474
New India Industries Ltd	128
New Standard Engineering Co Ltd	135, 418, 858
Permanent Magnets Ltd	290
Philips India Ltd	599
Poysha Industrial Company Ltd	589
Punjab Tractors Ltd	527

ENGINEERING COMPANIES—contd.

Raja Bahadur Motilal Poona Mills Ltd (Engineering Division)	48
Ramon & Demm Ltd	889
Ruston & Hornsby (India) Ltd	596
Rathi Alloys and Steel Ltd	808
Rane (Madras) Ltd	726
Sandur Manganese and Iron Ores Ltd	360
Seshasayee Industries Ltd	418
Shri Ram Mills Ltd (Engg. Division)	186
SLM—Maneklal Industries Ltd	189
SIMCO Meters Ltd	854
Standard Batteries Ltd	418
South Madras Electric Supply Corporation Ltd	701
Steel Containers Ltd	186
Stewarts and Lloyds of India Ltd	421
Surat Electricity Co Ltd	290
Tata Engineering & Locomotive Company Ltd	226, 244, 360
Tata Hydro-Electric Power Supply Co, Ltd	728
Tata Merlin and Gerin Ltd	420
Tata Power Company Ltd	698, 728
Tata Iron & Steel Co Ltd	280, 420, 474
Tensile Steel Ltd	244
Textile Machinery Corporation Ltd	132
Universal Steel & Alloys Ltd	599
Widia (India) Ltd	26
Zenith Steel Pipes Ltd	474, 885

ENVIRONMENT AND POLLUTION

Pollution and ecological balance	321
Radioactive wastes—Protecting the environment	683

EXPORTS

Chemical exports	389
Chemical exports—inputs cost going up	391
Chemexil Award for IDI (Supplement, August 12)	
Promoting exports of dyestuffs	xvii
Coir exports	82
Component export to Japan	273
Export booklet	163
Export damper	755
Export obligation	629
Exportable surpluses through consumption restraint	564
Greater assistance from IDBI	563
Growth of air cargo (Supplement, August 26)	
(i) An aid for exports	1
HMT—Export of technology	160
Illusory export drive	272
Iron ore exports—SOS from Goan industry	82
Jewellery exports	843
Jute exports paralysed	604
Readymade garments industry (Supplement, September 2)	
(i) Opportunities for export	1
Tea exports	691
The receding export target	616
What India can sell	103, 276, 577
Will compulsion help?	329

EXPORT ANGLE

All-time high in coir	
Boost for groundnut extraction	
Boosting cloth exports	
Bright outlook for castor oil	
Coffee for USSR	
Container terminal for Cochin	
Cosmetic leather bags	
Cotton textiles: Exports still inadequate	
Dehydrated onions	
Disappointing trend in silk	
Dry batteries for USSR	
Dwindling salt exports	
Engineering goods	
Engineering: Opportunities in Asia	
Export booklet	
Exporters in Mysore	
Ferrous scrap	
Fighting freight hikes	
Fiji fair	
Finished leather	
Handloom products	
Hasty shift?	
Hurdles for cloth	
Iron ore	
Iron ore from Goa	
Kandla free trade zone	
Missing strategy	
Misuse of entitlements	
Opportunity for perfumes	
Popular cosmetics	
Potential for plastics	
Push for coir	
Resumption of tyre exports	
Setback for chemicals	
Setback for scrap	
Shellac exports	
Shuttle cocks for Lima	
Stabilising pepper exports	
Starvation wages	
Sugar diffuser for Malaysia	
Take-over of cotton textiles	
TDA: A promising start	
The compulsion element	
Uptrend in textiles	

F

FINANCE (Budget)

Andhra Pradesh budget 1972-73	
Himachal budget	
Mysore budget 1972-73	
West Bengal budget	

FINANCE (General)

A mentor body for public financial institutions	
Central borrowings	136
Commonwealth Finance Ministers' Meeting—A ceremonial affair	
Finance Commission's tasks	
Highest government borrowings	
Hurdles in farm financing	
Incomes policy	
McNamara: Growth for the poorest of the world	
State loans	
States borrow more	

	PAGE		PAGE		PAGE
FINANCE (Specialised Financial Agencies)		INDUSTRIES—contd.		INDUSTRIES—contd.	
IDBI—Greater assistance to exports	563	Ball and roller bearings industry (Supplement, July 15)		(iv) Steel pipes: Growth problems	i
IFCI—Chairman's statement	850	(i) Achievements and goals	i	Soaps—A restrictive policy	218
IRCI—Branching out into new areas	756	(ii) Rapid progress in production	viii	Some aspects of foreign collaboration in Indian industry	84
SFCs—Another out-of-date report	756	Bihar's industrial drive	148	Steel wires and ropes (Supplement, July 1)	
FINANCE (Taxation)		Bright bars manufacturing industry	429	(i) Constraints on development	31
A curb on black money	496	Dispersal of industries—Satellite towns around Madras	218	(ii) Large unutilised capacity	33
Corporate taxation—No rise in burden	567	Entertainment electronics (Supplement, September 16)		(iii) Steel wires and ropes: A profile	33
Tinkering with black money	557	(i) Entry into sophisticated fields	v	Tata memorandum—Plea for selective approach towards big houses	504
Wanchoo panel post-mortem	261	(ii) Marketing of radio receivers	i	Telco's expansion plans	217
Wanchoo Report on direct taxes—A weak base for recommendations	20	(iii) Problems of components industry	vii	The respectable joint sector	18
Wider tax net	15	(iv) Profile—Radio receivers industry	iii	The switchgear industry (A feature, August 12)	
FISHERIES AND MARINE PRODUCTS		(v) Unhealthy reliance on foreign know-how	iii	(i) Major manufacturers	vii
Development of fisheries	677	Indian Sugar Mills Association	110	(ii) Power Plan brightens industry's prospect	i
G		Industries in and around Ambattur (Supplement, July 1)		(iii) Progress in manufacture	v
GOLD AND SILVER		(i) A model industrial estate	9	(iv) The switchgear industry: A profile	iii
Glittering gold	604	(ii) Ambattur Industrial complex: A creation of the sixties	1	The tragedy of IISCO	203
Silver speculation	366	(iii) Ambattur industrial estate and its environs	7	TISCO expansion—A plea for Japanese consultants	504
Silver tumbles	480	(iv) Ambattur: A statistical profile	17	Vanaspati and edible oils (Supplement, August 12)	
Silver: Smugglers active again	892	(v) PVC Pipes in the service of agriculture	11	(i) Profile—Vanaspati and edible oils	xi
I		Industrial licensing—Harmonising the objectives	840	(ii) Scientific cottonseed crushing	xiii
IMPORTS		Industrial development—Integrating the small with the big	162	(iii) Shortages hamper growth	ix
Import replenishment	389	Industrial estates—Limited success for programme	631	Welding equipment and electrodes (Supplement, July 22)	
Import substitution	217	Industrial fasteners' requirements	563	(i) Major manufacturers	vii
Stainless steel: Continuous rise in imports	695	Industrial and power boilers (Supplement, September 3)		(ii) New challenges to the industry	i
Tractor imports for whom?	562	(i) Importance of maintenance	791	(iii) Surfacing methods	v
Wood pulp imports	81	(ii) Industrial and power boilers: A profile	793	(iv) Welding equipment and electrodes: A profile	iii
INDO-PAKISTANI AFFAIRS		(iii) Packaged boilers	795	INSURANCE AND PROVIDENT FUNDS	
Chinese shadow over Simla	551	(iv) Power station boilers	795	Deposit Insurance Corporation	662
First proof of new chapter	294	(v) Steel pipes and tubes for boilers	797	General insurance: Compensation—Discrimination against Indian companies	275
India-Pakistan Agreement: Turning back from precipice	68	Industrial research—who should be the beneficiary?	210	Insurance compensation—Justice for Indian insurers	507
Making the most of the summit	8	IISCO take-over: The background	222	Life Insurance Corporation of India	708
Prospects of India-Pakistan trade	335	IISCO: Victim of labour trouble and pricing policy	223	LIC—Momentum maintained	631
Retreat from the past?	8	Iron ore—SOS from Goan industry	82	INTERNATIONAL INSTITUTIONS	
Simla Agreement: First road-blocks cleared	556	Joint Sector—In search of a form	628	Asian Development Bank (ADB)—India's increased contribution	559
The Simla Agreement between India and Pakistan	113	Jute—Industry worried over supply not price	80	International Monetary Fund (IMF) and the poor world	675
Trek back to sanity	63	Khadi and village industries in the Indian economy	767	International Monetary Fund (IMF): Proposals for reform	626
INDO-SOVIET AFFAIRS		Maharashtra challenges the policy on large houses	841	IMF Report: How to restore the Fund's authority	716
Indo-Soviet Co-operation	829	Malayasia—Indian joint venture in textiles	751	World Bank Report: Serious debt difficulties ahead for developing countries	777
Indo-Soviet trade: A shared adventure	512-15	Making a scapegoat of local manufacturers	16	World Bank: Growth for the poorest of the world—McNamara's views	846
INDUSTRIES		Making the joint sector work	4		
Aluminium—Hindalco's idle capacity	565	Man-made fibres—inadequate research efforts	565		
Aluminium—Take-over of Hindalco	274	Paints and varnishes (Supplement, July 8)			
Association of Man-made Fibre Industry (Bombay)	96	(i) Advances in varnish industry	i		
		(ii) Paints and varnishes: A profile	iii		
		(iii) The growth of paint industry	v		
		Pipes and tubes industry (Supplement, July 19)			
		(i) Growing demand for PVC pipes	v		
		(ii) Major manufacturers	vii		
		(iii) Pipes and tubes: A profile	iii		

J

JOINT SECTOR

Joint sector—In search of a form ...	628
Joint sector projects—West Bengal invites private entrepreneurs ...	844
Making the joint sector work ...	4
The respectable joint sector ...	18

JOINT VENTURES ABROAD

EEC-India joint ventures: But where is the private sector? ...	568
Indian joint venture in textiles in Malaysia ...	751

JUTE

The State of West Bengal Supplement, August 5)	
(i) Difficult phase for Indian jute industry ...	49
(ii) Industry worried over supply not price ...	80
Jute exports paralysed ...	604

L

LABOUR

Bonus: The debate continues ...	552
Bonus: Disturbing implications ...	843
Bonus: The drift continues ...	743
Cement Strike: Labour Minister kept on sidelines ...	562
8.33 per cent bonus ...	755
Minimum bonus: Can government resist labour pressure? ...	680
Strike: Municipal Centenary to the rescue? ...	501
Strikes at Simpson and API—End of a nightmare ...	828
Tamil Nadu: Another pay rise ...	553
The battle for trade union control	436
The trade union movement in West Bengal ...	67
(West Bengal—A Survey, August 5)	
West Bengal: Bigger conflicts ahead	682

LAND CEILING AND LAND REFORMS

Ceiling: Not hilly for land reforms	443
Land ceilings: A Pandora's box for Congress ...	153
Land ceilings: A realistic way out ...	264
Maharashtra: No agricultural land for rich non-agriculturists ...	382
Mysore: Land only for cultivators	382
Socialisation of urban land ...	208

LEADING ARTICLES

Bhutan's impulse for growth ...	491
Bonus: The drift continues ...	743
Chinese shadow over Simla ...	551
IMF and the poor world ...	675
Industrial slack: Words, words, words	615
Narmada: Waiting for PM's award	259

PAGE

LEADING ARTICLES—contd.

The challenge of scarcity ...	315
The devaluation of pound sterling ...	3
The economy off the course ...	375
The price front hots up again ...	147
The Silver Jubilee ...	435
The tragedy of IISCO ...	203
Trek back to sanity ...	63
World Bank: Cars or buses? ...	827

LETTERS

Bank nationalisation ...	314
Civic employees' strike ...	490
Cue from Mysore ...	2
Currency reserves of Bangladesh	434
Cyclone warning ...	826
Growth of public sector ...	614
"Growth for whom?" ...	674
Jnanapeeth Award ...	258
Lags in Unit Trust ...	146
LIC and policyholders ...	742
Ministerial austerity ...	258
New entrepreneurs ...	374
Public sector and the public ...	62
Simpson units ...	550
The Church in revolt ...	202
Trade unionism in DGCI and S ...	109

M

MANAGEMENT

Consultancy—NIDC's significant contribution ...	693
Large research outlay ...	316
State Bank: Consultancy service for small entrepreneurs ...	74
MAN-MADE FIBRES	
Association of Man-made Fibre Industry (Bombay) ...	96
Man-made fibres production ...	629
Man-made fibres—Inadequate research efforts ...	565
Tyre cord: No import ban ...	53
Sirpur and Sirsilk Mills: No proposal for take-over now ...	388
South India Viscose Ltd ...	180
Wood pulp imports ...	81

MARKET GOSSIP

A small steel bank ...	424
Argon gas ...	366
Back to business ...	192
Belapur sugar ...	480
Bill market scheme ...	366
Bright bars ...	424
Buoyant groundnut oil ...	732
Central borrowings ...	136, 816
Cheaper copper ...	192
Coffee agreement saved? ...	664
Competition from Bangladesh	816
Compulsory cloth exports ...	53
Costlier coal ...	892
Cotton: Ready for monopoly scheme	250
Cotton: Record carryover ...	664
Cotton yarn prices cut ...	366

PAGE

MARKET GOSSIP—contd.

Dala Street at standstill ...	13
Diamond trade ...	29
Disturbed stock markets ...	48
Echoes of £ float ...	13
Excise content of steel prices ...	29
Glittering gold ...	60
Good days for yarn ...	89
Groundnut oil—Unworkable control	89
Help for machinery manufacturers ...	42
Highest government borrowings ...	53
Jute exports paralysed ...	60
Lanka rupee ...	19
More banking funds in long-dateds?	25
Procurement of cotton? ...	48
Rebates for sugar ...	89
RBI: Tough on a wrong issue ...	60
Share listing ...	25
Sharp price rise in foodgrains ...	25
Shrinking cement ...	19
Silver speculation ...	36
Silver: Smugglers active again?	89
Silver tumbles ...	48
Slump in rubber ...	73
States borrow more ...	66
State loans ...	29
Steel price hike ...	29
Sugar: Incentives for production ...	53
Sugar runs amuck ...	36
Tyre cord: No import ban ...	5
Who is the party? ...	8
Worry over compensation ...	8

MINES AND MINERALS

How to revive Burmese Mines? ...	39
Iron ore export ...	2
Iron ore exports—SOS from Goan industry ...	4
Iron ore from Goa ...	44
MMTC—Better Service for Consumers	84
Takeover of non-coking coal mines?	44
MINING COMPANIES	
Mining and Allied Machinery Corporation Ltd ...	14
National Mineral Development Corporation Ltd ...	66
Sahu Minerals and Properties Ltd ...	53
The Sandur Manganese & Iron Ores Ltd ...	28, 3
West Bokaro Ltd ...	44

MINERAL OIL AND OLEAGINOUS MATTERS

A dent in oil monopolies ...	88
A 6-million tonne refinery for the north ...	88
Burmah-Shell Refineries Ltd ...	11
Crude: Royalty issue resolved ...	68
Indian Oil Corporation Ltd ...	802, 88
Indian Oil International Ltd ...	88
IOC's march ahead ...	68

PAGE

	PAGE		PAGE		PAGE
MINERAL OIL AND OLEAGINOUS MATTERS—contd.		MISCELLANEOUS ECONOMIC MATTERS—contd.		MISCELLANEOUS ECONOMIC MATTERS—contd.	
Malaviya Committee Report—Killing it through delay?	620	Bihar's industrial drive	148	(5) On threshold of second industrial revolution	16
ONGC—Organisations within organisation?	274	Bill market scheme	366	(6) The industrial economy of West Bengal	2
MISCELLANEOUS		Bright bars: Licensing policy	424	25 Years of Independence, (A Survey, August 19)	
A ceremonial affair: Commonwealth Finance Ministers' meeting	828	Central borrowings	816	(1) Changes in corporate organisation	54
Bihar's war on administrative delays	389	Cess on power pumps	563	(2) Development of small industries in free India	63
Bhutan's impulse for growth	491	Courts and the economy	277	(3) Development strategy, plan process and policies	5
Bureaucratic assault on students	681	Disposal of industries: Satellite towns around Madras	218	(4) Evolution of Union-State financial relations	82
Cabinet reshuffle	260	Dollar's small gesture	260	(5) Growth for whom?	3
Chinese shadow over Simla	551	Economy: Reality vs Prime Minister's complacency	152	(6) Growth of the public sector	59
Composition of our population	42	End of bamboo dispute?	834	(7) Growth of foreign trade	72
Co-partnership in public sector?	492	Excise content of steel prices	296	(8) Industrial development: A quarter century review	45
CPM's neutral identity	65	Exportable surpluses through consumption restraint	564	(9) The secular behaviour of the Indian economy	16
Damodar Valley Corporation—Controversy over dismemberment	558	General insurance: Compensation—Discrimination against Indian companies	275	The tragedy of IISCO	203
End of Farakka dispute	499	Help for machinery manufacturers	424	WTI—More for the unit holder	161
Flagrant black racialism	492	Indian Copper Corporation: Worry over compensation	816	Well meaning dialogue with industry	501
Good-bye to prohibition	436	Industrial estates: Limited success for programme	631	Worry over compensation	816
In search of scapegoats	676	Industrial licensing: Harmonising the objectives	840		
India, Iran and Pakistan	687	Industrial slack: Words, words, words	615	P	
Looking after Princes	552	Industrial research: Who should be the beneficiary?	210	PAPER MILLS	
Making a scapegoat of local manufacturers	16	Industrial development: Integrating the small with the big	162	Eurokote (India) Ltd	475
McGovern's prospects	204	Insurance compensation: Justice for Indian insurance	507	Pudumjee Pulp and Paper Mills Ltd	360
Progress of Adivasis through education (25 Years of Independence—A Survey, August 19)	93	Joint sector: In search of a form	628	Seshasayee Paper & Boards Ltd	884
Public sector—Top posts go vacant	499	Khadi and village industries in the Indian economy	767	The Bengal Paper Mills Co Ltd	106, 356
RBI agitation—Soiled notes and soiled relations	17	Khadi and Village Industries Commission	219	Titaghur Paper Mills Co Ltd	885
Revolt in Uganda	745	Land Reforms Act: Planters' worry	563		
Russian wheat deal—A bad harvest for Nixon Administration	830	Listing of shares: Ensuring continuous market for shares	216	PERSONALITIES	
Simla accord ratification	316	Maharashtra challenges the policy on large houses	841	P. C. Mahalanobis: A tribute	104
Smuggling—Bangladesh border to be sealed	633	Man-made fibres: Inadequate research efforts	866	Senator George McGovern	213
Solution to social evils	81	Missing policy for advertisements	212		
South Asia and the Super Powers	569	North-Eastern Zonal Council	376	PLASTICS	
Swatantra's new look drive	4	Optimum capacity utilisation	15	Export potential for plastics	163
The Silver Jubilee of India's Independence	435	Rural market: The rich and poor areas	221	Growing demand for PVC pipes (Pipes and tubes industry—Supplement, July 29)	V
The State of West Bengal—A Survey, August 5)		Smuggling: Bangladesh border to be sealed	633	PVC pipes in the service of agriculture, (Industries in and around Ambattur—Supplement, July 1)	II
(i) A quarter century of rural Bengal	71	Socialisation of urban land	208		
(ii) Some modern trends in Bengali literature	69	Solution to social evils	81	PLASTICS COMPANIES	
(iii) West Bengal: Yesterday, today and tomorrow	18	Some aspects of foreign collaboration in Indian industry (Concluding part)	84	Kosmek Plastics Manufacturing Ltd	186
US wheat for China	744	Spectre of scarcity	329		
Voice of money	745	State loans	296	POLITICS TODAY	
Who cares for Survey of India?	616	States borrow more	664	Communist Party of India's role vis-a-vis the Congress	677
MISCELLANEOUS ECONOMIC MATTERS		Take-over of private power units	152	Congress and the Tamil Nadu 'farmers' agitation	149
A mentor body for public financial institutions	508	Tamil Nadu: Another pay rise	553	Congress to become a mass-cum-cadre party? What Mohan Dhar's proposals mean	745
A small steel bank	424	Tata Memorandum: Plea for selective approach towards big houses	504		
Aluminium: Hindalco's idle capacity	565	The economy off the course	375		
Aluminium: Take-over of Hindalco	274	The challenge of scarcity	315		
Basic problems for increasing fertiliser consumption during the seventies	633	The State of West Bengal (A Survey, August 5)			
Bigger role for the State agencies	330	(1) A challenge to local entrepreneurs	27		
		(2) Greater integration of industry and agriculture in Fifth Plan	12		
		(3) Industrial growth and prospects	33		
		(4) Massive investment needed	31		

	PAGE
POLITICS TODAY—contd.	
Forthcoming organisational elections of the Congress and the anti-defection Bill	553
Government, internal tensions and the CPI (M)	65
Implications of the Bombay strikes	377
Opposition, some policies of the Government and people's grievances	5
Plan proposals and Plan implementations—K. N. Raj's critique: some comments	261
Recent CPI stance and the Congress stand	617
Sarvodaya movement takes up politics? Socialist Party policy committee's draft of the Party platform: Meeting the need to restructure Indian polity?	205
Taking stock: Twenty-five years of India's independence	437
The authorities and the people: Growing fissures	493
The monsoon session of the Parliament: Issues and parties	317

POVERTY AND EMPLOYMENT

Andhra Pradesh: Crash programme of self-employment	74
Decentralised sector: The only hope for jobless	331
Employment: Focus on industrial sector	383
Golden jubilee of khadi: A movement that provides jobs to two million poor	219
Khadi and Village Industries Commission: A movement that provides jobs to two million poor	219
Poverty in India: Measurement and amelioration	99
25 years of Independence (A Survey, August 19)	

R**REPORT : THE NATION**

AHMEDABAD:	
Accent on power and social services	70
Narmada accord—End of inter-State rivalry	264
BANGALORE:	
Centre helps make budget purposeful	10
Mysore: Land only for cultivators	382
Power: Beginnings of a national grid	558
Shocks from Sharavathy	211
The palace politics	210
BHOPAL:	
End of bamboo dispute?	834
Fancy food planning	73
Who will pay for the schemes?	72

REPORT : THE NATION—contd.

BOMBAY:	
IOC's march ahead	623
Industrial research: who should be the beneficiary?	210
Lesser and costlier power	832
Maharashtra: No agricultural land for rich non-agriculturists	382
Malaviya Committee Report—Killing it through delay?	620
Rajasthan Atomic Station—A watershed in nuclear power programme	440
Strikes—Municipal Centenary to the rescue?	501
Swatantra demands probe in Belapur Sugar	267
CALCUTTA:	
Challenges ahead for Mr Ray	835
Damodar Valley Corporation—Controversy over dismemberment	558
Drought: Rs 26-crore plan to fight damage	443
End of Farakka dispute	499
Higher land revenue rates	9
Labour: Bigger conflicts ahead?	682
Lack of co-ordinated approach	559
Moving towards balanced development	71
Power-hungry West Bengal	445
Power shortage hits expansion plans	72
Synthetics—A common danger to India and Bangladesh	265
COONOR:	
UPASI—For rural welfare	749
HYDERABAD:	
Accent on rural development	10
Crash programme of self-employment	74
KOTAH:	
Rajasthan Atomic Station—Power for hungry north	748
MADRAS:	
No longer a farmers' stir	154
Power—A cut of 25 per cent	832
NEW DELHI:	
A curb on black money?	496
Asian Development Bank—India's increased contribution	559
Beginning of India—US dialogue	70
Crude—Royalty issue resolved	683
Economy—Reality vs PM's complacency	152
Employment: Focus on industrial sector	383
Fertiliser consumption: Rising trend sets problems	620
Fertilisers: Self-sufficiency still far away	496
Higher prices for paddy	833
India-EEC Trade—Solution still not in sight	834

REPORT : THE NATION—contd.

Land ceilings: A realistic way out	264
Land ceilings: A Pandora's box for Congress	153
Minimum bonus: Can government resist labour pressure?	680
Missing policy for advertisements	212
Radioactive wastes: Protecting the environment	683
Simla Agreement: First road-blocks cleared	556
Socialisation of urban land	208
State Bank—Consultancy service for small entrepreneurs	74
Steel Holding Company—Will it deliver the goods?	208
Take-over of private power units	152
Tinkering with black money	557
Well-meaning dialogue with industry	501
PATNA:	
Bureaucratic assault on students	681
SHILLONG:	
Nagaland: A calculated risk	750
SIMLA:	
Not hilly for land reforms	443
India-Pakistan Agreement: Turning back from precipice	68
Making the most of the summit	8
Pong Dam refugees' woes to end	267
SRINAGAR:	
National policy on water	73
Rail link with Jammu	838
TRIVANDRUM:	
Incomplete roads under crash programme	75
REPORT : THE WORLD	
BONN:	
West Germany: Brandt prepares for mid-term elections	837
BRUSSELS:	
EEC: India's case for commercial co-operation	386
EEC: Narrowing the trade gap with India	446
EEC: Pointers from agreement with Tehran?	752
EEC and textiles: Import from Portugal, not India	214
OECD and developing countries —Trade concessions with a price tag	838
CAIRO:	
Egypt tries another union	387
Moscow's Aswan Dam	212
President Sadat's gamble	325
Vicious circle of violence and counter-violence	684
Whither Indo-Egyptian trade?	560
COLOMBO:	
Hands tied to massive Chinese aid?	156
DACCA:	
A game of neutralisation?	77
Imports to fight price rise	561
Waiting for China trade?	327

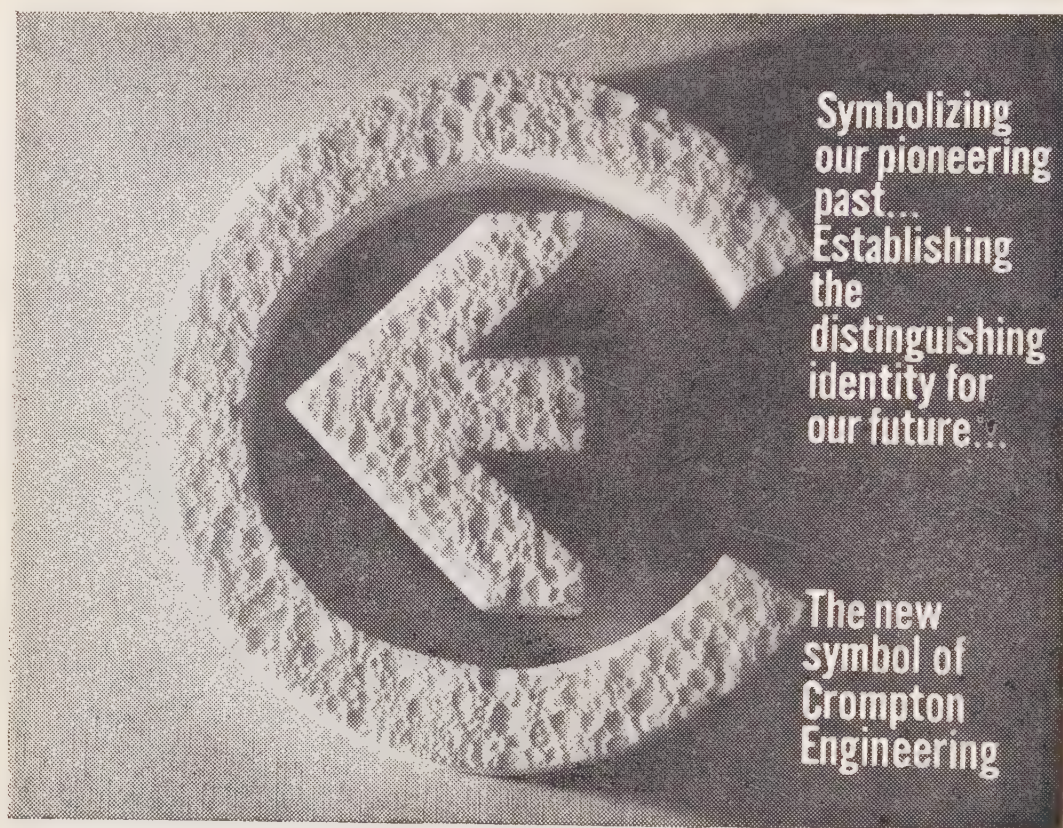
	PAGE		PAGE		PAGE
REPORT: THE WORLD—contd.					
HONG KONG:					
HK\$: Off the sterling hook ...	157	S			
Tanaka-Chou summit: The shadow of Taiwan ...	836				
KUALA LUMPUR:					
Indian joint venture in textiles ...	751	SHIPPING AND PORTS			
LONDON:					
Heath's worst crisis ...	271	Fighting freight hikes ...	645	STEEL COMPANIES	
MOSCOW:					
India, Iran and Pakistan ...	687	PORTS—Calcutta to raise charges? ...	844	Calcutta Steel Co Ltd ...	722
PARIS:					
A dent in oil prices ...	79	Shipping lines conduct ...	389	Jotindra Steel and Tubes Ltd ...	189
Communist-Socialist unity for power ...	215	Singapore enters container era ...	160	Mahindra Ugine Steel Company Ltd ...	38
ICFTU: For Europeans only? ...	502	SHIPPING COMPANIES			
Pound float—Real threat to new parity structure ...	502				
YANGON:					
Administration: Inspiration from Lenin ...	685	Chowgule Steamships Ltd ...	874	Mukand Iron and Steel Works Ltd ...	590
Trade follows friendship ...	79	Dempo Steamships Ltd ...	808	Rathi Alloys and Steel Ltd ...	808
SINGAPORE:					
Last nails on sterling area coffin? ...	11	India Steamship Company Ltd ...	876	Steel Holding Company ...	208
Road to Asian peace through Korea? ...	155	Ratnakar Shipping Co Ltd ...	882	Tata Iron and Steel Co Ltd ...	280, 420, 474
Vietnam: Garbled signals? ...	625	South India Shipping Corporation Ltd ...	174, 290	Universal Steel and Alloys Ltd ...	599
T. AVIV:					
Free enterprise or war economy? ...	326	STATISTICS			
Palestinians have damaged their cause ...	753				
Peace no nearer ...	624	Ambattur: A statistical profile (Industries in and around Ambattur: A feature, July 1) ...	17	STOCK EXCHANGE	
Preparing for decisive talks with EEC ...	385	Closed cotton textile mills ...	142	Bombay Stock Exchange: Back to business ...	192
IMPHEU:					
India loses a friend ...	270	IMF operations 1972 ...	822	Dalal Street at standstill ...	136
KYO:					
Priority for the China question ...	159	India's exports ...	610	Disturbed stock markets ...	480
Nixon-Tanaka meeting—Diplomatic gain for Japan ...	624	India's imports ...	198	Listing of shares—Ensuring continuous market for shares ...	216
Tanaka: A break with the past? ...	76	Indian Economy: Basic Indicators ...	9, 71, 153, 209, 265, 323, 381, 441, 495, 557, 621, 681, 833	Share listing ...	250
The drive for Asian leadership ...	447	Industrial production ...	59, 670	SUGAR	
US Trade: Talks make no headway ...	447	Jute and mesta ...	254	A shield for sugar industry? ...	436
WASHINGTON:					
\$750 million grain for Russia ...	157	Statistics for the quarter century of Independence (25 years of Independence, A Survey, August 19) ...	115	In search of a policy ...	80
MF: Proposals for reform ...	626	West Bengal: A statistical profile (West Bengal: A Survey, August 5) ...	75	Rebates for sugar ...	892
Pound Float: Will it force American hands ...	12	STEEL			
Russian wheat deal: A bad harvest for Nixon Administration? ...	836				
US Presidency: Economy is the major issue ...	503	A small steel bank ...	422	Sugar diffuser for Malaysia ...	461
Will McGovern produce a surprise? ...	76	Excise content of steel prices ...	296	Sugar: Good intentions but no policy ...	629
RUBBER					
Resumption of tyre exports ...	867	IISCO Takeover ...	217	Sugar: Incentives for production ...	530
Slump in rubber ...	732	IISCO: Take-over: The background ...	222	Sugar—Notice to private sector ...	226
Small sector's interests ...	330	IISCO: Victim of labour trouble and Pricing Policy ...	223	Sugar runs amuck ...	366
RUBBER COMPANIES					
Deat Tyres of India Ltd ...	885	Setback for scrap ...	27	Swatantra demands probe in Belapur Sugar ...	267
Goodyear India Ltd ...	472	Staggering losses forecast for southern plants ...	272	SUGAR COMPANIES	
National Rubber Manufacturers Ltd ...	290	Stainless steel: Continuous rise in imports ...	695	Andhra Sugars Ltd ...	527
Premier Tyres Ltd ...	646, 809	Stainless steel: Economic realism or economic regionalism? ...	757	Belapur Sugar & Allied Industries Ltd ...	183, 480
Sanfort Tyres Ltd ...	888	Steel holding company: Will it deliver the goods? ...	208	Ganganagar Sugar Mills Ltd ...	476
SUPPLEMENTS: Industry profiles					
		Steel pipes and tubes for boilers (Industrial and power boilers, Supplement, September 3) ...	797	Harinagar Sugar Mills Ltd ...	356
		Steel pipes: Growth problems (Pipes and tubes industry, Supplement, July 29) ...	1	Indian Sugar Mills Association ...	110
		Steel price hike ...	296	Kothari Sugars & Chemicals Ltd ...	244
		Steel price rise: A half-hearted step ...	269	Nigam Sugar Factory Ltd ...	247
		Steel products supply ...	449	Sir Shadi Lal Sugar and General Mills Ltd ...	132
		Steel wires and ropes (Supplement, July 1) ...	31	SUPPLEMENTS: Industry profiles	
		(i) Constraints on development ...	31	Ball and roller bearings industry, July 15 ...	i-viii
		(ii) Large unutilised capacity ...	33	Entertainment electronics, September 16 ...	i-viii
		(iii) Steel wires and ropes: A profile ...	33	Growth of Air Cargo August 26 ...	i-vii
		Tisco expansion: A plea for Japanese consultants ...	504	Industrial and power boilers, September 23 ...	791, 798
				Industries in and around Ambattur, July 1 ...	1-24
				Paints and varnishes, July 8 ...	i-viii
				Pipes and tubes industry, July 29 ...	i-viii
				Readymade garments industry, September 2 ...	i-viii
				Steel wires and ropes, July 1 ...	31-35
				The switchgear industry, August 12 ...	i-viii
				Vanaspati and edible oils, August 12 ...	ix-xiv
				Welding equipment and electrodes, July 22 ...	i-viii
				SUPPLEMENTS: Miscellaneous	
				Chemexil Award for IDI, August 12 ...	xv-xx
				Industries in and around Ambattur, July 1 ...	1-24
				Khadi and village industries in the Indian economy, September 23 ...	767, 774
				The State of West Bengal, August 5 ...	1-88
				25 Years of Independence, August 19 ...	1-120

	PAGE		PAGE		PAGE
T		TOBACCO		TRANSPORT, ROADS AND TOURISM	
TEA		Godfrey Philips India Ltd ...	242	Commercial Vehicles—Telco's expansion plans ...	22
Tea exports ...	691	India Tobacco Co Ltd ...	286, 466	Hotels for tourists ...	82
Tea exports to Sudan ...	103	National Tobacco Co of India Ltd ...	358	Kerala: Incomplete roads under crash programme ...	
Tea industry needs finance ...	53	TOILETRIES			
(West Bengal: A Survey, August 5)		Export opportunities for perfumes ...	697	V	
Tea industry—inadequate subsidy ...	329	Export: Popular cosmetics ...	103	VEGETABLE OIL AND VANASPATI	
TEXTILES		Soaps: A restrictive policy? ...	218	Boost for groundnut extractions ...	68
Boosting cloth exports ...	229	TRADE		Bright outlook for castor oil ...	11
Closed cotton textile mills ...	89	Balanced trade with Sudan ...	617	Buoyant groundnut oil ...	7
Compulsory cloth exports ...	53	Diamond trade ...	296	Edible oil prices ...	44
Cotton textiles: Still inadequate ...	461	EEC—India's case for commercial co-operation ...	386	Groundnut extractions—GEEDA locates new markets ...	68
Cotton textiles—out of stagnation? ...	840	EEC—India's joint ventures: But where is the private sector? ...	568	Groundnut oil: Unworkable control ...	88
Cotton yarn prices cut ...	366	EEC—Narrowing the trade gap with India ...	446	Soaps: A restrictive policy? ...	22
Disappointing trend in silk ...	276	EEC—Pointers from agreement with Tehran? ...	752	Vanaspati and edible oils (Supplement, August 12)	
Good days for yarn ...	892	EEC and textiles: Import from Portugal not India ...	214	(i) Scientific cottonseed crushing ...	
Handloom products ...	402	Expanding Indo-Iraqi co-operation ...	412	(ii) Shortages hamper growth ...	
Helping modernisation of industry ...	451	HMT: Export of technology ...	160	(iii) Vanaspati and edible oils: A profile ...	
Hurdles for cloth ...	27	India-EEC Trade: Solutions still not in sight ...	834	W	
MP textile units' woes ...	329	Indo-Egyptian trade ...	828	WHAT INDIA CAN SELL	
Need for new mills ...	843	Indo-Soviet co-operation ...	829	What India can sell ...	103, 276, 58
Powerloom weavers' woes ...	449	Indo-Soviet trade: A shared adventure	512	WOOLLEN INDUSTRY	
Readymade garments industry (Supplement, September 2)		ICFTU: For Europeans only? ...	502	Woollen industry's plea ...	38
(i) Opportunity for exports ...	i	OECD and developing countries: Trade concessions with a price tag ...	838		
(ii) Major manufacturers ...	vii	Prospects of India-Pakistan trade ...	335		
(iii) Readymade garment industry: A profile ...	iii	Whither Indo-Egyptian trade? ...	560		
Textile industry's woes ...	563				
Uptrend in textiles ...	867				
Woollen industry's plea ...	329				



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Ambattur industrial complex: A creation of the sixties

by V. RAMAMURTI

AMBATTUR, a small town on the tenth milestone from Madras Central on the broad gauge railway line to Erokonam, was catapulted to industrial fame by the enterprise of Mr A. M. Murugappa Chettiar who established the T.I. Cycles factory there in the early 'fifties and saw it grow to a commanding position in the neighbourhood before he passed away in the early sixties.

The only other large-scale factory—that of Dunlop Rubber Co (India) Ltd—set up in the Ambattur area in 1956-57 for the manufacture of cycle tyres was about all that carried forward during the later 'fifties the industrial momentum initiated by the T.I. Cycles factory. All other large-scale, medium-scale and modern small-scale industries established later in the environs of Ambattur and its industrial estate went into production in the earlier or the later years of the 'sixties. What has now acquired the distinction of an industrial complex was thus created almost entirely during the 'sixties. It is indeed a logical development that ancillary industries feeding the cycle factory and the automobile plants (Ashok Leyland and Standard Motors outside the Ambattur

area) constitute a substantial segment of this complex.

Engineering industries are a dominant feature of the Ambattur industrial complex, as will be seen from the accompanying table.

Not all the units figuring in the above classification are large-scale undertakings as described by the Department of Industries. A separate list of such undertakings is given in the *Statistical Profile* at the end. In the following paragraphs are given brief descriptions of some of the major engineering and non-engineering units working in the Ambattur industrial area.

Engineering industry

Tube Investments of India Ltd: Established in 1949, this group consists of T.I. Cycles of India (at Ambattur), The Wright Saddles of India (at Ambattur), Tube Products of India (at Avadi, three miles west of Ambattur) and T.I. Metal Sections, and two subsidiary companies—T.I. Diamond Chain Ltd and T.I. Miller Ltd—at Ambattur. The licensed capacity of the cycle factory is up to 3 lakh cycles per annum. The factory manufactures the principal components for cycles. Saddles, chains and dynamo lamps for bicycles are manufactured by the respective other con-

cerns of the group. Tube Investments of India Ltd has a fully paid share capital of Rs 3.75 crores and its reserves and surplus aggregated Rs 2.43 crores as at the end of 1970.

TVS Group of Industries: To the TVS Group belong several automobile ancillary units situated in the Padi area adjoining the Ambattur Industrial Estate. These units are Wheels India, Lucas-TVS Ltd, Sundaram-Clayton Ltd, Brakes India and Sundaram Fasteners.

Inside

Ambattur Industrial Estate and its environs	7
By A SPECIAL CORRESPONDENT	
A model industrial estate	9
By K. S. KRISHNASWAMY	
PVC pipes in the service of agriculture	11
By T. VIJAYARAGHAVAN	
Statistical profile	17

Mr Ramamurti is Commerce Correspondent in Madras.

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LUCAS - TVS LIMITED, PADI, MADRAS 50

LUCAS INDIAN SERVICE LIMITED, MADRAS - BOMBAY - CALCUTTA

between them they manufacture ancillaries such as wheels, starter motors, dynamos, horns, exhausters and compressors, brake systems, and high tension bolts, nuts and rivets.

Marshall, Sons & Co (Mfg.) Ltd: Incorporated as a private limited company in December 1962, the company commenced manufacture as an ancillary industry for mining and quarrying equipment in April 1963. Subsequently, technical collaborations with three leading British manufacturers were finalised in 1964-65 and thereafter production of bituminous paver finishers and various types of stone crushers/granulators and hot/cold mixing plants for asphalt was progressively taken up. For the first time in the country Marshall-Blawknex paver finisher for mechanised laying of asphalt was manufactured by the company in 1967. The paver finisher is a sophisticated equipment in the field of road construction and a must for speedy and superior construction of roads, highways and airfields. The present installed capacity caters for a yearly production of about Rs 70 lakhs. The company is at present working in rented premises. Construction of its own factory building on a 10.20-acre site in the Ambattur Industrial Estate has already begun and it is expected that production activities at the new site will commence by August this year.

Sivanandha Steels Ltd: Sivanandha Steels Ltd was established to produce quality steel and alloy steel castings. Its factory is located in the Ambattur Industrial Estate. The Company employs about 400 workers and has a highly qualified team of technical personnel. The Company has a sanctioned capacity of 3,000 metric tonnes per annum of alloy steel and steel castings. The foundry is equipped with a 4-ton electric arc furnace. It has sophisticated testing facilities for destructive and non-destructive testing like X-ray equipment and ultrasonic equipment, besides a modern chemical laboratory. The factory has helped the public sector undertakings in their import substitution policy by supplying quality castings which were hitherto imported by them. It is specialising in the production of manganese steel and meeting the full requirements of various leading cement companies for such steel. It has also specialised in the manufacture of castings required for valve manufacturers and is supplying quality valve castings for high pressure duty conditions. The factory caters to the needs of various Government departments such as Defence and Railways and of thermal stations and ship-building establishments.

Best & Co (Pvt) Ltd: Bests' pump factory in Ambattur is housed in a new, large and well-laid out premises, with sophisticated testing facilities and quality control systems, besides an up-to-date research and development wing to innovate new designs and to develop equipment for special needs. The current Beacon range includes pumpsets for agricultural, general service, water supply, industrial and other applications. Special purpose pumps for petrochemical and refinery applications have also been developed. Not long after their beginning to make pumps, Best & Co diversified further by starting more manufacturing units for such modern and essential equipment as automotive elec-

manufacturing facility will ultimately handle sophisticated and engineered products with export potential, besides those for the home market. The present manufacturing range includes busducts of all types, from isolated phase bus to inter-leaved low impedance busducts, control and relay panels, metering panels, control kiosks and switchboards.

India Forge and Drop Stampings: This undertaking, established in 1961-62, is a major engineering unit located in the Ambattur Industrial Estate. It has an installed capacity to produce 7,200 tonnes of steel forgings and drop stampings and 240 tonnes of non-ferrous stampings per annum. It has a workforce of 820.

Southern Switchgear Ltd: Established in 1962-63, the company is located in the Industrial Estate. It has an installed capacity to produce 2,400 low-voltage switchgears, 2,400 busbar chambers, 6,000 motor starters and 6,000 iron-clad switches per annum.

Omega Insulated Cables: This enterprise, established in 1960-61, has an installed capacity to produce 45 million core yards of PVC and VIR cables, 280 miles of paper insulated power cables and 3,000 tonnes of ACSR and AA conductors.

Rubber products industry

Dunlop India: The Dunlop Rubber Factory, established in the 'fifties at Ambattur, is outside the industrial estate. It is the third largest single manufacturing unit in the area in terms of labour employed, the first and the second places being claimed by the T.I Cycles factory and the Lucas-T.V.S. factory, respectively. This unit has an installed capacity to produce more than 4 million cycle tyres, 2 million butyl cycle tubes, about 36,000 automobile tyres and 25,000 automobile tubes per annum.

Madras Industrial Linings Ltd: Located at the Ambattur Industrial Estate, Madras Industrial Linings Limited (MILL) is equipped with the latest facilities to undertake the complete range of rubber and other elastomer linings (annual production capacity 20,000 sq metres) for all types of standard and highly specialised equipment. Technical collaborators of MILL are Société Chimique de Gerland of France, a leading chemical producer and anti-corrosion lining firm in Europe, with over 50 years' experience in anti-corrosive and anti-abrasive linings and coatings. Under the terms of the collaboration agreement, the French firm has

Types of industries in the Ambattur industrial complex (Year 1970)

Industry	No. of units	Average No. of workers employed daily
Engineering industries :		
Basic metal industries ..	9	1,687
Metal products (except machinery and transport equipment) ..	25	1,063
Machinery (except electrical machinery) ..	30	1,620
Electrical machinery, apparatus and appliances ..	14	1,784
Transport equipment ..	18	6,811
Total ..	96	12,965
Other industries :		
Food (except beverage) ..	5	500
Footwear, other wearing apparel, etc. ..	4	474
Paper and paper products ..	3	65
Printing and allied industries ..	1	48
Rubber and rubber products ..	5	1,705
Chemical and chemical products ..	7	358
Non-metallic mineral products ..	1	23
Electricity, gas and steam ..	3	180
Miscellaneous industries ..	13	1,151
Total (other industries) ..	42	4,504

trical equipment for heavy duty, commercial vehicles, passenger and goods lifts, and industrial carbons.

The Crompton Engineering Co (Madras) Ltd: A complex for the manufacture of all types of generating station busducts, switchboards and panels—an important step in the expansion programme of Crompton Engineering—went into operation at the Ambattur Industrial Estate on the 11th February 1971. The unique thing about this unit is that it produces isolated phase busducts which were hitherto completely imported. This

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Chemical products industry

Tata Fison Industries Ltd: This factory is located in the industrial estate. It has an installed capacity to produce 500 tonnes of dust formulations, 500 tonnes of wettable powders, 200 tonnes of sprays and emulsions, 10,000 litres of pesticides (liquid), 300 tonnes of copper fungicides dust, etc per annum. It is a

medium-scale unit employing 150 persons.

Food products industry

Britannia Biscuit Co: This unit is situated in the Padi area adjoining the industrial estate—the same area where the units of the TVS Group are located. It employs 366 men and 71 women workers. Commissioned in 1965-66 the factory has a capacity to produce 1,200 tonnes of biscuits per annum. As a regional factory of the company, it ensures quicker supply of fresh biscuits to the Madras market.

Small-scale industries

Modern small-scale industries, some of them using sophisticated equipment, have come up in the Ambattur area, thanks to the subsidised facilities provided by the industrial estate. A majority of the units mentioned in the Statistical Profile section are small-scale units. A break-up of the small-scale units registered with the Director of Industries is available for the Ambattur area only as of December 31, 1967, though the totals for Chingleput District, Madras District and the whole of Tamil Nadu, as of March 31, 1972 could be more readily had.

Available figures for the Ambattur area, as at the end of 1967, show that 140 small-scale units were working in the area. A broad industry-wise classifica-

tion of these units is given below:

	No of units
Engineering industries ...	87
Non-engineering industries ...	53
Total ...	140

The total outlay on the 140 small-scale units, as of December 31, 1967 in the Ambattur area, was Rs 4.09 crores, giving an average of about Rs 2.92 lakhs per unit. Again as of that date, the number of workers employed by the 140 units was 5,120, that is, on an average 37 workers per unit. The capital outlay per worker employed was Rs 7,890. It is possible that the average outlay per small-scale unit would have increased during the years 1968-72 because of the generally higher level of prices.

The engineering industries constitute the dominant group in the small-scale sector, as in the medium- and large-scale sectors, in the Ambattur area. Non-engineering industries such as those relating to chemicals, fertilisers, pharmaceuticals, dyestuffs, plastic and polythene products, paints and varnishes, may gain in importance in all the sectors in the future as the secondary effects of the Madras Refinery, the Madras Fertilizers and the existing or proposed petro-chemical industries come into play. This, incidentally, points to the possibilities of further growth of industries in the Ambattur area during the 'seventies. □

Ambattur Industrial Estate and its environs

by A SPECIAL CORRESPONDENT

THE Ambattur Industrial Estate project was conceived in 1961. Land acquisition for the estate commenced the same year and the first clod of earth was turned in 1962. The first batch of factories commenced production in 1963. By 1965 the entire estate was humming with industrial activity, with almost a hundred factories in production. The aggregate Government outlay on the project included Rs 77 lakhs towards the cost of land, Rs 223 lakhs for the construction of factory units and other buildings, and Rs 56 lakhs towards sewage, water supply, etc.

In Phase I of the project, 137 factory units have been constructed. The built areas of different types of units and the

monthly rentals are given in the accompanying table.

A subsidised rent of 13 paise per sq ft is charged for these units at pre-

sent. The monthly demand towards factory rent is Rs 1.38 lakhs.

About 1,200 acres of land in Phase I and II have been developed. The

Built areas of industrial units

(Area in sq ft)

Type	No. of units	Built area of each unit			Unbuilt open space of each unit	Total area of each unit	Rent per month per unit Rs.
		office	factory	amenity building			
A	10	2,728	11,773	1,540	13,119	29,160	1,981
B	20	2,728	9,826	1,540	14,410	28,504	1,736
C	20	2,228	7,879	1,369	12,415	23,891	1,401
D	20	2,225	5,932	1,322	11,632	21,115	1,155
F	17	1,685	4,074	205	7,923	13,887	702
G	18	905	3,042	205	5,765	9,917	485
FA	2	1,040	3,194	3,112	8,709	16,055	881
FB	4	856	2,076	1,680	7,471	12,083	536
FC	6	409	1,197	1,096	3,398	6,160	313
L	20	..	1,053	48	6,099	7,200	..

developed plots range in size from $\frac{1}{2}$ acre to 25 acres, and are provided with facilities such as water supply, power supply, drainage, sewage and roads. The cost of the plot is Rs 20,000 per acre. Of the 124 plots available in Phase I, 110 have been allotted. In Phase II, of the 173 plots available, 80 have been allotted.

Ninety-nine double-room tenements and 54 single-room tenements have been constructed for the benefit of the workers in this Estate. The monthly rents are Rs 26.50 for a double-room tenement and Rs 24 for a single-room tenement.

Unlike the conventional type of industrial estate which entertains only small-scale industries, the Ambattur Industrial Estate is designed to accommodate small, medium and large indus-

tries. It provides not only ready-built factory units for small industrialists but also developed plots on which entrepreneurs can put up their own buildings for small, medium or large industries.

The estate lies in an important industrial belt where a number of large industries such as the Integral Coach Factory, Central Heavy Vehicles (Tanks) Factory, T. I. Cycles, T. V. S. Group, Dunlop and Omega Cables, are located. It is situated in the Saidapet taluk of Chingleput district, three miles from the municipal limits of Madras City. The estate spreads on either side of the Madras-Avadi Road, and the Madras-Arokonam broad gauge railway line (on the routes to Bombay, Bangalore and the West Coast) is its northern boundary.

Space is being provided for the location of chemical and fruit-based industries with amenities like steam cold storage and tin-can making units. The factory units are so designed with plenty of open space as to facilitate future expansion. For instance, a 'type unit' can be expanded to an 'A' type one by adding two more bays and a 'type unit' to 'C' type by a similar procedure. Only subsidised rent is charged for the units in the initial stages. The cost of developed plots is recovered in instalments.

The estate is also provided with labour tenements, transport facilities, power and water supply, petrol bunk, industrial training facilities, banking services, residential accommodation and departmental common service centres.

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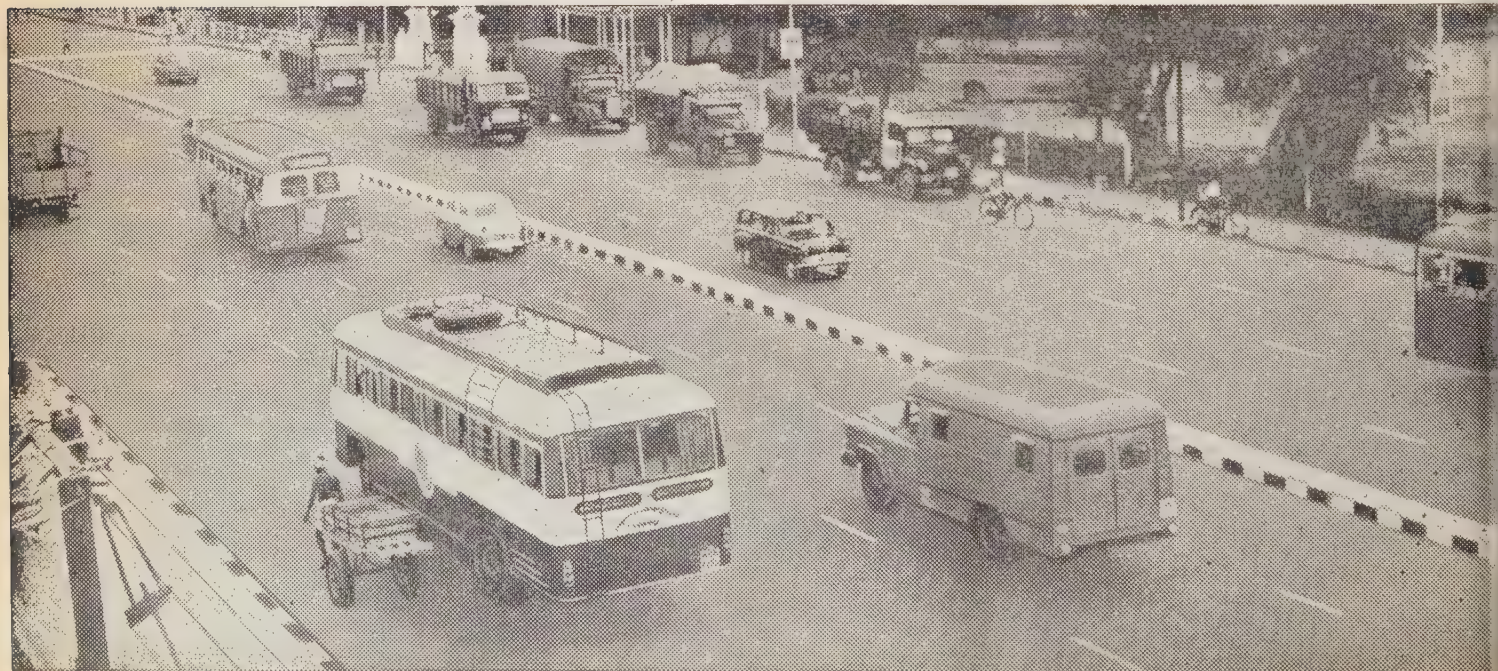
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A model industrial estate

by K. S. KRISHNASWAMY

INDUSTRIAL estates which have been promoted under the Plans are meant to encourage growth of small industries, to attract small-scale industries from congested areas to estate premises so as to increase productivity, to achieve decentralised development of industry in small towns and villages and to foster growth of ancillary industries in townships surrounding major industrial undertakings. The Ambattur Industrial Estate—a model to emulate—is a major venture in this direction. It is a unique example of how the State can, with careful preliminary planning and effort, reduce considerably the time-lag between the conceiving of an industrial unit and its actual establishment. The estate, situated on the Madras-Avadi road and occupying about 1,200 acres of land, is the biggest of its kind in Tamil Nadu and perhaps in the whole of India.

The Ambattur estate is maintained by the Department of Industries of the Government of Tamil Nadu. The first phase of establishing industries—in rented factory units or on developed plots—is nearing completion in the southern portion of the estate covering an area of 630 acres. The second phase of establishing industries in the northern portion covering an area of 570 acres is now in full swing. The estate may be broadly classified into (a) area occupied by the ready-built units of varying sizes wherein space for factory is provided by the Department of Industries and Commerce on a rental basis at the rate of 10 paise per sq ft per month and facilities like water supply, roads, sewage and lights are made available on charges to be levied, (b) developed plots on the (southern and northern sides) where land alone is allotted at the rate of Rs 20,000 per acre and the entrepreneurs are required to construct factory buildings, where also the same amenities are offered. There is a move afoot, as elsewhere, to give away the rented units on deferred payments and, in both cases, it would result ultimately in self-contained ownership.

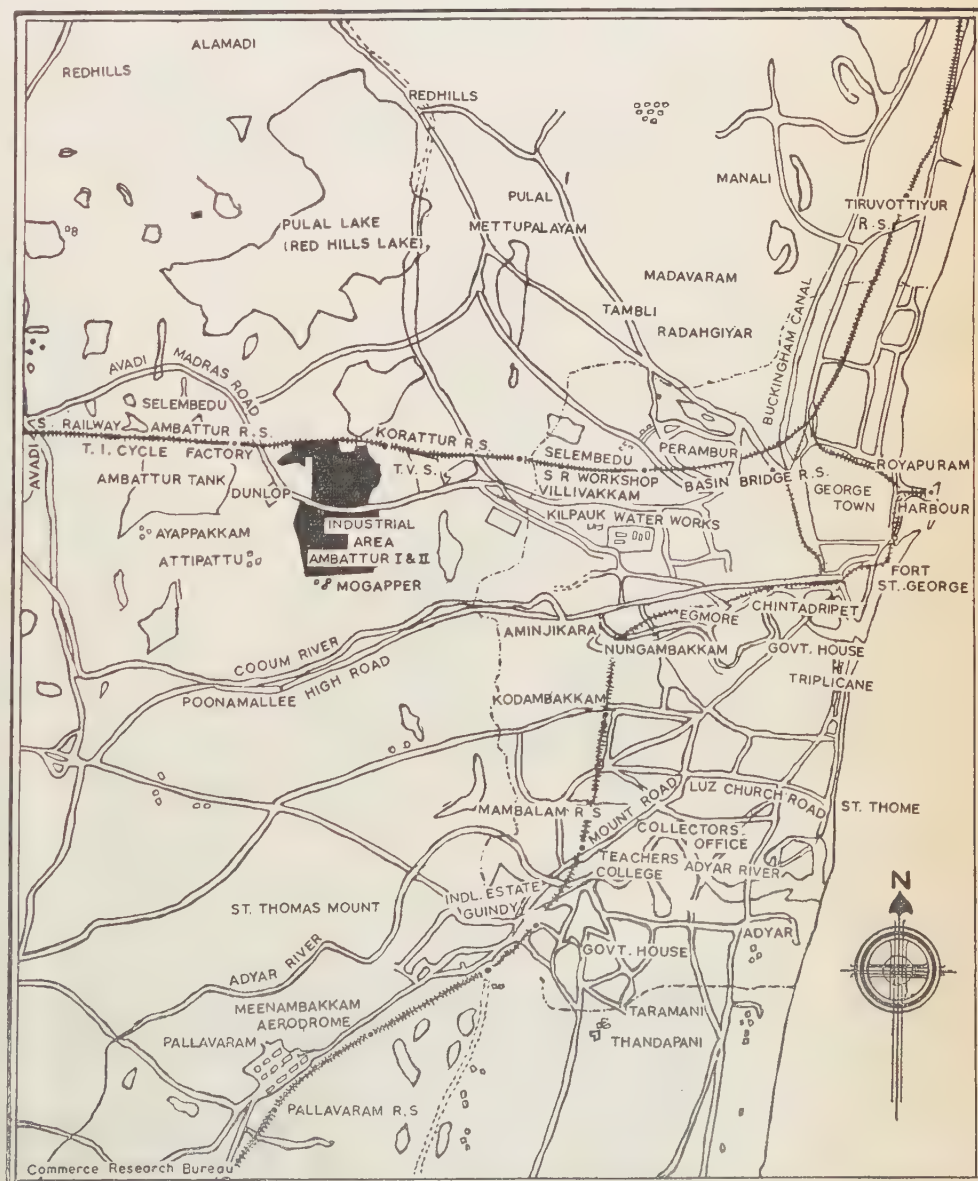
For the benefit of artisans, who have emerged as a new class of entrepreneurs, ready-built factory units are made available on a nominal rent of about Rs 100 per month. The estate is

well served by modern tool rooms which caters for the requirement of industries in the estate as well as outside in tools, dies, jigs and fixtures. There are structural and fabrication workshops which handle a variety of engineering jobs. A telephone exchange, a post and telegraphs office, a fire station, a police station and a petrol bunk have been provided. The State

Bank of India and the Indian Overseas Bank and a branch of the Life Insurance Corporation are also functioning.

There are a good number of tenements constructed in the eastern part of the estate for the benefit of industrial employees. A canteen and a technical information library are some of the other facilities. A dispensary of

AMBATTUR INDUSTRIAL AREA LOCATION MAP



Mr Krishnaswamy is President of the Ambattur Industrial Estate Manufacturers' Association.

the Employees' State Insurance Corporation is situated in the neighbourhood of the estate. The nearest railway station is Korattur, about a mile north of the estate.

While government control over the estate is exercised by the Administrative Officer appointed by the Industries Department, the industrialists of the estate have their own organisation—the Ambattur Industrial Estate Manufacturers' Association—to look after their

interests relating to (i) rent, maintenance of amenities, security, etc within the estate, and (ii) procurement of raw materials, taxation (municipal, State and Central), import and export. Each such association of industrial estate manufacturers in the State is linked to the Tamil Nadu State Industrial Estates' Association which also seeks liaison with the authorities for easing out their common problems. The Federation of Association of Small In-

dustries of India, which is a central all India organisation for small industries in general, has its regional organisation in Madras and all these bodies are affiliated to it for tackling their problems at the all-India level.

The Ambattur Association is making arrangements for setting up permanent exhibition of products manufactured by industrial units in the estate. Space has been provided by the Department of Industries and Com-

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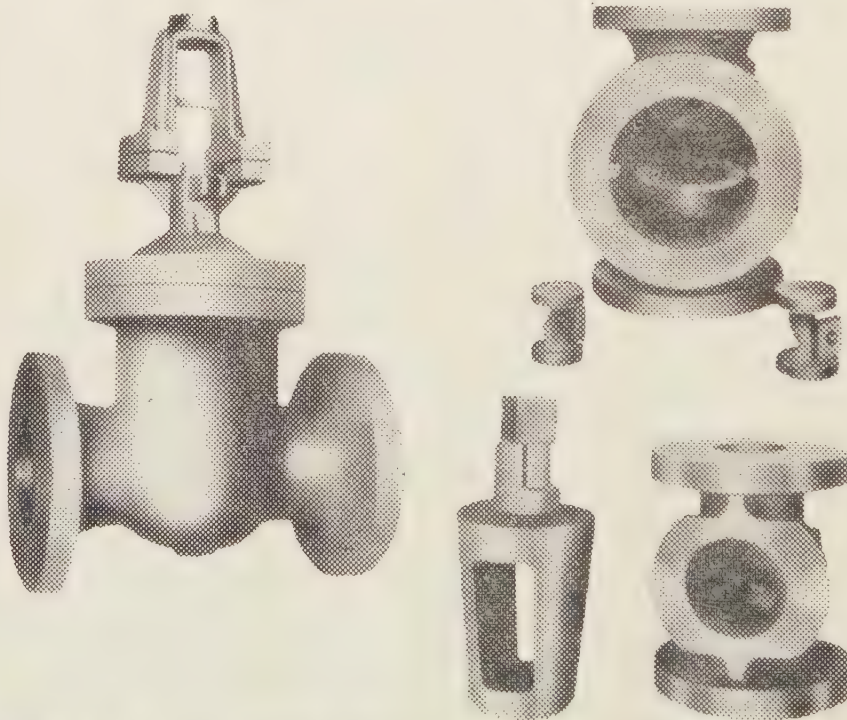
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force for this purpose. In addition, the association is taking steps for bringing out a directory of its members in the near future. It has also a proposal to institute an award for the best export performance by any member during a year.

The range of production in the Ambattur Industrial Estate covers machine tools, engineering accessories and equipment, tractors and agricultural implements, P.V.C. pipes and tubes, cables, packaging materials, footwear, domestic appliances, weld mesh, brake and clutch linings, garments, fans and a variety of electrical and mechanical appliances, extrusions, ferrous and non-ferrous castings, die and tool making, precision instruments, sophisticated electronic equipment and food products.

Further, several ancillary items which are required by automobile industries and the railways are manufactured in the Estate.

The Ambattur Estate has brought into existence factories of various sizes with investments ranging from Rs 3 lakhs to Rs 3 crores per unit. The total capital investment in the area, estimated on the basis of figures furnished to the Ambattur Industrial Estate Manufacturers' Association by its members, is of the order of Rs 20 crores and this investment has generated employment for about 10,000 people. The aggregate annual turnover of all the units in the estate is about Rs 30 crores to Rs 35 crores and the wages disbursed to employees is of the order of Rs 2.5 crores to Rs 3 crores a year. After the

first-phase industries are fully developed and the second phase is completed, as many as 30,000 workers are expected to be employed by all the units in the estate.

To sum up, the Ambattur Industrial Estate is a judicious admixture or a harmonious blending of large, medium and small industries. Besides generating additional employment, it acts as an instrument attracting new entrepreneurs. The estate provides vast scope for the formation of new capital and enables small businessmen with low capital to enter the field of manufacturing. Situated right in the heart of a growing industrial belt, the Ambattur Estate bears testimony to the skill and enterprise of entrepreneurs, technocrats and labour alike. □

PVC pipes in the service of agriculture

T. VIJAYARAGHAVAN

THE use of rigid PVC pipes for potable rural water supply, borewell application, sprinkler irrigation and pumpset connections is catching up in our country. However, we still have to go a long way compared to advanced countries such as Japan, Germany and the Netherlands in the use of PVC pipes for these applications. The total yearly consumption of rigid PVC pipes in India now is about 2,000 tonnes against 15 lakh tonnes in Germany, 1.6 lakh tonnes in Japan and 60,000 tonnes in Holland.

Conservatism and the tendency to take the line of least resistance by sticking to old methods are some of the reasons for PVC pipe applications not developing fast enough. Another aspect is the cost of raw material—the PVC resin. Compared to the international market, the cost of resin in India is nearly 50 per cent. At present there are only four major plants in India, manufacturing about 40,000 tonnes per annum. When the writer was in Europe recently, information was gathered at Rotterdam that the PVC resin plant of 50,000 tonnes per annum capacity in one of the refinery complexes was being considered uneconomical and they were, therefore, going in for a 1.5 lakh tonnes unit,

completely scrapping the existing unit. In India, however, the biggest plant we have is only of 20,000 tonnes capacity.

Also, it is understood that the most economical resin plants are naphtha-based. But in our country other raw materials are used in some plants, which, apart from being in short supply from time to time, put up the cost of the resin manufactured. Right now there is scarcity of PVC resin in the country, due to which the prices are tending to go up. However, other manufacturing units are coming up in the field which may ultimately bring down the cost of resin over a period of time. If this happens, the cost of PVC pipes will become much more economical and this will result in more widespread use of rigid PVC pipes for the applications already mentioned.

Only 3.5 per cent of the rural population has so far been provided with safe piped water supply in our country. During the 20-year period from 1950 to 1970 only Rs 150 crores were spent on rural water supply schemes. It is estimated that nearly Rs 750 crores would be required to provide safe drinking water for the entire rural population. The Fourth Five-Year Plan has provided Rs 150 crores for rural water supply schemes. Nearly 40 to 50 per cent in any water supply scheme goes towards the cost of pipes. From this one can realise the necessity of effecting eco-

nomy, consistent with quality, in the purchase of pipes for the various water supply schemes. This is where rigid PVC pipes come into the picture.

Tables 1 and 2 give the cost of PVC pipes compared to G.I. up to 90 mm and CI and AC over 90 mm, taking into account the installation cost.

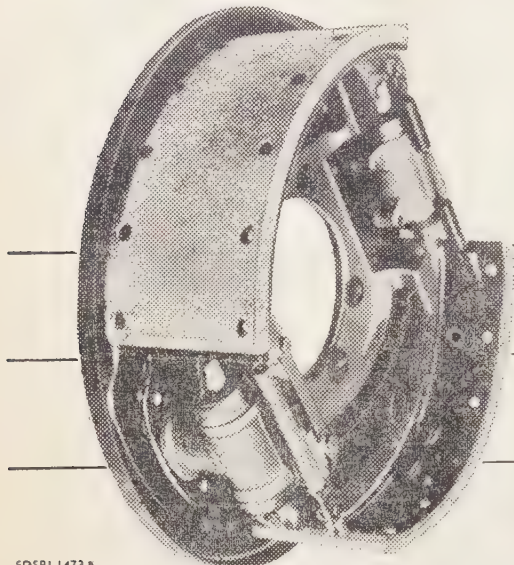
From the amount that is made available for rural water supply schemes more villages can be provided with safe drinking water with the use of rigid PVC pipes. The States of Tamil Nadu, Uttar Pradesh, Rajasthan and Haryana have already entered into rate contracts with PVC pipe manufacturers

Table 1 : PVC and GI pipe prices

Size in MM	Price of PVC pipe per metre (Rs)	Price of GI pipe per metre (Rs)	Percentage saving
20	2.10	3.59	41
25	2.65	4.75	44
32	3.95	6.37	38
40	5.70	7.92	28
50	7.00	9.89	29
63	7.90	12.57	37
75	9.90	17.30	43
90	10.75	20.50	47

Mr Vijayaraghavan is Marketing Manager of Wavin India Ltd, Ambattur Industrial Estate.

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in view of the economy. In Tamil Nadu more than 600 villages use PVC pipes for water supply. Uttar Pradesh has bought in the last few months nearly 40 lakhs worth of PVC pipes mostly for rural water supply schemes. Rigid PVC pipes are suitable for the hilly and mountainous regions of Nagaland, Assam, West Bengal, Uttar Pradesh, Himachal Pradesh, Jammu and Kashmir in view of their light weight and the ease with which they can be transported without any breakages. PVC pipe is also ideal for installation in saline soils encountered in Rajasthan and Gujarat and the coastal belts of West Bengal, Orissa, Tamil Nadu and Kerala in view of their resistance to corrosion.

Recently a sample from the first-ever PVC line for water supply laid in India at Chattarpur in the outskirts of Delhi in 1962 was cut out and taken and it was found that there was absolutely no deterioration in the quality of the pipe. The bore was also smooth without any incrustation, whereas in conventional pipes like CI, apart from being corroded, there is usually considerable amount of incrustation reducing the flow as the inner surface is not as smooth as that of PVC pipe. Also, as PVC pipes are non-conductors of electricity, there is no deposition due to electrolytic action as in the case of metal

pipes due to earth fault current. Above all, while the prices of conventional pipes such as AC, GI and CI are going up year after year, the price of PVC pipe is steadily going down.

In view of the fact that rigid PVC pipe is a new product in this country, and our inherent tendency is to over-design with a higher factor of safety,

Table 2 : Installation costs

Size in MM	Total installed cost/metre		
	PVC (Rs)	AC (Rs)	CI (Rs)
90	12.00	16.00	24.50
110	13.50	20.00	30.50
140	19.50	24.50	37.00
160	24.00	30.00	45.75
200	39.50	45.50	65.50

PVC 4 kg. Working pressure =
AC-Class II = CI-IA

the wall thickness as per our standards is on the high side, even after making allowance for higher ambient temperature compared to pipes manufactured in developed countries. The wall thick-

ness therefore is bound to be brought down with experience and PVC pipes may become still cheaper.

Table 3 shows how far PVC pipes have replaced even a comparatively recent product like AC pipes in Denmark and Sweden over the past eight years. The same pattern may emerge in our country.

For thousands of years flood irrigation has been practised in our country. This requires large quantities of water, much of which goes waste and also reduces soil fertility. Maintenance of field channels involves additional expense and reduces the effective area for cultivation. Sprinkler irrigation with rigid PVC pipes is the most modern method of controlled overhead irrigation. This method is very much in vogue in advanced countries such as Holland and is being introduced in India gradually. In this system, water is pumped under pressure through portable water pipes fitted with quick couplers. Through these pipes are connected at intervals sprinkler laterals, from which water is forced through revolving sprinkler heads to fall as fine spray. Being light-weight and easy to handle, the whole system can be removed from one area to another till the entire field is covered. This method requires only half of the water

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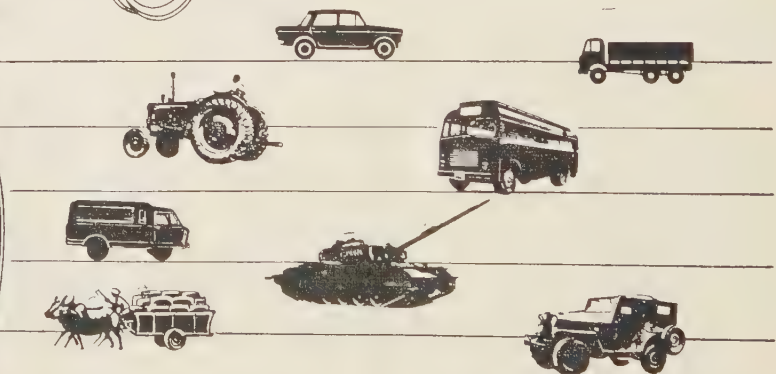
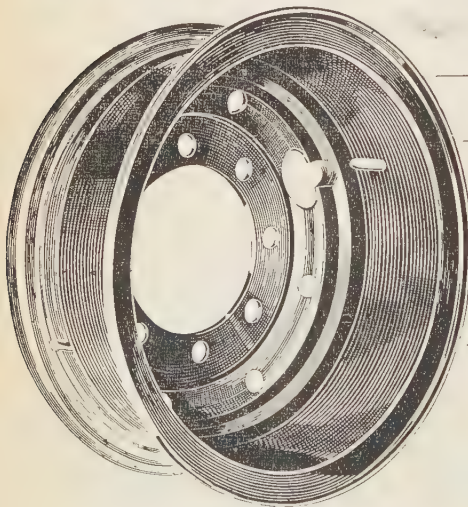
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quired for the conventional type of irrigation, and helps avoid over or under-irrigation only the right quantity of water is utilised and the soil structure is maintained. Excess water leaches it depriving it of valuable minerals. Surface irrigation also permits the soil to breathe easily enabling easy aeration. Another advantage is that uneven land can be irrigated without incurring any expenditure on account of levelling. It is also possible to dope soluble fertilizer to the irrigation water.

The sprinkler irrigation system involves purchase of pumpset; but the extra cost is more than offset by the economy in cost of levelling, channel construction, economy in water and other maintenance expenses involved in flood irrigation. In large farms tractors can be operated between fields without having to cross water channels. At present sprinkler irrigation systems using aluminium pipes are marketed widely in our country, and the total sales now amount to Rs 2 crores per year. PVC pipes are also being used gradually in view of the many inherent advantages compared to metal pipes such as non-corrosiveness, easy installation, ease with which they can be repaired on the spot, and cheaper cost. The necessary sophisticated injection moulded fittings specially designed

for this system are also now manufactured in our country.

In a vast country like ours, the necessity for tapping underground water for drinking and irrigation purposes cannot be over-emphasised, and at various governmental levels units have been set up for exploiting this source. Large amounts are being spent by the various State Governments and the Centre for this purpose. Here again PVC pipes can play a very important role in reducing the cost. PVC pipes have been used for tubewell application for depths up to 600 feet in India. Compared to conventional metal pipes, the cost is around 65 per cent.

Rigid PVC pipes have been used for tubewell application by the Central Ground Water Board, the Ground Water Division of the PWD (Tamil Nadu), etc. The Tamil Nadu Agricultural Department has used PVC pipes extensively in the Minjur area of Ponneri Taluk and farmers have standardised on PVC pipes. The Directorate of Tubewells in Madhya Pradesh has conducted elaborate tests on the use of rigid PVC pipes on borewell application and reports received so far indicate that the tests have been successful.

Farmers are finding it more economical to use PVC pipes for suction as well as delivery lines. In many parts of Tamil Nadu during summer the water table goes down and the wells become dry. The farmer takes the pumpset to the bottom of his well and pumps water from a borewell. In such cases dismantling of pumpsets with GI pipes

Table 3 : Utilisation of PVC and AC pipes in Denmark and Sweden

Year	Denmark		Sweden	
	PVC	AC	PVC	AC
1962	625	13,889	1,983	6,434
1963	3,313	11,687	2,448	7,217
1964	3,936	12,044	4,091	7,091
1965	4,842	11,158	6,410	8,516
1966	6,580	9,420	10,350	4,995
1967	8,740	8,260	10,680	4,700
1968	9,927	7,601	11,570	4,300
1969	12,721	8,691	12,180	3,900
1970	12,904	6,295		

involves additional cost and time. Rigid PVC pipes answer all these problems. They minimise dependence on skilled plumbers in rural areas and enable a comparatively unskilled farmer to make perfect joints and repairs inexpensively and quickly. □

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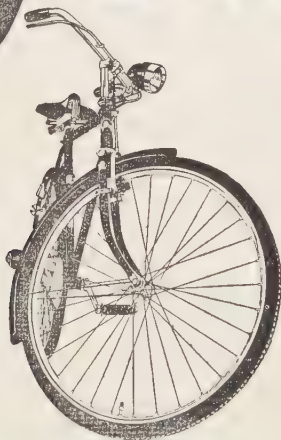
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Ambattur: A statistical profile

Employment in factories worked by power (1970)

Madras Postal Circle No.	Name of factory	Average number of workers employed daily			Madras Postal Circle No.	Name of factory	Average number of workers employed daily		
		men	women	total			men	women	total
	<i>Food except beverage</i>								
53	Bharat Flour Mills	25	—	25	58	Industrial Feeders	40	—	40
53	T. Pachappa Nadar	7	—	7	58	Sivananda Steels	359	—	359
50	Britannia Biscuit Co	366	71	437	58	S. K. V. Industries	36	—	36
50	Padi Egberts India Ltd	11	2	13	58	Metal Cast Services	213	—	213
53	Ambattur Peanut Products (P) Ltd	18	—	18	58	Pressmac Industries	16	—	16
	<i>Footwear, other wearing apparel and made-up textile goods</i>					<i>Metal products (except machinery and transport equipment)</i>			
58	Ambattur Universal Footwear ..	17	13	30	58	Madras Metal Can Manufacturers ..	17	7	24
58	Onward Trading	23	—	23	53	Bharath Metals Corporation ..	17	—	17
58	Coromandel Garments	33	195	228	53	Madras Can Factory	14	—	14
58	Ambattur Clothing	24	169	193	58	Standard Metal Pressing	23	—	23
	<i>Paper and Paper Products</i>				58	Paramount Industries	(not received)		
58	R. K. Paper Industries	19	3	22	58	J. Stead & Co	88	—	88
58	Siva Packaging Industries	33	—	33	53	Modern Industries	15	—	15
58	Scientific Packaging Industries ..	5	5	10	58	Sri Lakshmi Industries	15	—	15
	<i>Printing and publishing</i>				58	Sundaram Fastners	185	—	185
58	Vacha Fine Arts	47	1	48	58	Southern Electricals (P) Ltd ..	35	—	35
	<i>Rubber and rubber products</i>				58	Evans Industries	14	—	14
53	Dunlop India	1,546	2	1,548	58	Metro Engineering	51	1	52
58	General Rubber Latex	48	—	48	58	Madras Metal Pressing	18	—	18
58	Automobile Rubber Products ..	23	—	23	58	Sarada Industries	64	1	65
58	Madras Industrial Linings	75	—	75	58	Engineering Tools and Services ..	49	2	51
58	Air Foam Industries	11	—	11	58	Madras Metagraph	40	9	49
	<i>Chemical and chemical products</i>				58	Standard Machine Tools	47	—	47
58	Tata Fishon Industries	131	21	152	58	General Engineering Industries ..	68	1	69
53	Ultramarine and Pigments	129	1	130	58	India Filters Manufacturers (P) Ltd..	53	—	53
58	Mehta Paints	6	—	6	58	N. S. Krishna Rao Body	23	—	23
58	Kapadia Paints	17	—	17	58	Associated Engineering	83	3	86
58	Winstone India (P) Ltd	15	—	15	58	Comsales Industries	37	2	39
58	JBA Printing INK	18	—	18	58	Eskeyar Engineering	30	—	30
58	The Calcutta Chemical	20	—	20	58	Swiss Welded	39	—	39
	<i>Non-metallic mineral products (except products of petroleum and coal)</i>				53	Bharath Metal Rolling	12	—	12
53	Deccan Safety Glass	23	—	23		<i>Machinery (except electrical machinery)</i>			
	<i>Basic metal industries</i>				58	Kunal Engineering	121	—	121
53	Madras Wire Products	55	—	55	58	Government Tool Room Shop (State)	35	1	36
58	India Forge and Drop Stamping Ltd	820	—	820	58	Kerry Jost Tools	38	—	38
58	Indian Bright Steel Co Ltd	81	2	83	58	Kwality Industries	74	—	74
58	National Engineering Co	65	—	65	58	Bitual (P) Ltd	16	—	16
					58	Productivity Elements	41	—	41
					58	Armcoess Gauge	73	—	73
					58	Gordon Woodroffe Engineering Ltd	57	—	57
					58	Machines Mandrels	29	—	29
					58	Es-Tee Engineering	20	—	20
					58	Hargo Industries (Machine Tools) ..	26	—	26
					58	Transistor Products (P) Ltd ..	40	4	44

COMMERCE

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EDITOR : VADILAL DAGLI

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Ambattur: A statistical profile

Employment in factories worked by power (1970)—contd.

Madras Postal Circle No.	Name of factory	Average number of workers employed daily			Madras Postal Circle No.	Name of factory	Average number of workers employed daily		
		men	women	total			men	women	total
	<i>Machinery (except electrical machinery)—contd.</i>								
58	Madras Spindle Co	35	—	35	53	T. I. Cycles of India	1,900	2	1,902
58	Engineering Service Corporation ..	80	—	80	58	Es-Tee Hubs and Drives	18	—	18
58	Common Lease Shop (State) ..	15	—	15	50	Wheels India Ltd	537	—	537
58	Government Structural Workshop (State)	230	—	230	53	Wright Saddles of India	41	—	41
53	Coromandel Steels Ltd	184	2	186	53	T. I. Diamond Chain	325	—	325
53	Madras Radiators and Pressings ..	110	—	110	50	The Lucas T.V.S. Ltd	1,657	123	1,780
58	Chemech Engineers (P) Ltd	84	—	84	50	Sundaram Clayton	754	—	754
58	Marine Ancillaries (P) Ltd	16	—	16	58	The Dovel Pistons Ltd	23	—	23
58	Indo-Europe Trading Co (P) Ltd ..	14	—	14	50	Brakes India	892	44	936
58	Sri Kamakshi Industries	36	—	36	58	Sarvodaya Industries	19	—	19
50	Marshall and Sons	142	2	144	58	Automac Madras (P) Ltd	167	—	167
58	Arkey National Engineering	21	1	22	58	National Engineering Co (Madras) (P) Ltd	28	—	28
58	Engineering Accessories (P) Ltd ..	20	—	20	58	Saral Industries	24	—	24
58	Machine Tools Accessories (P) Ltd ..	9	—	9	58	Rane Brake Linings	126	—	126
58	Engineering Investment (P) Ltd ..	30	—	30	58	National Industries	4	2	6
50	Venkatesh Enterprises	5	2	7	58	Autolec Industries	65	3	68
58	Instruments & Apparatus (P) Ltd ..	6	1	7	58	Karkit Pvt Ltd	57	—	57
58	The Standard Workshop	(Not received)				<i>Miscellaneous industries</i>			
	<i>Electrical machinery, apparatus, appliances and supplies</i>				58	Toshinwal Instruments	56	2	58
58	Shibha Instruments	42	—	42	58	Hydrogen (P) Ltd	31	—	31
58	Best and Co	66	—	66	58	Tovac Equipments	49	2	51
58	Southern Switchgear Ltd	356	7	363	58	Plastometal	33	1	34
58	Kel Components	64	45	109	58	National Plastic Industries	20	—	20
58	The Omega Insulated Cables C(I) Ltd	145	—	145	58	Autotrol Corporation	30	—	30
58	Vinyl Cable Industries	44	9	53	50	Lakshmi Pattern Works	18	—	18
58	Kemcos Chemical Industries	23	1	24	58	Lloyd Bitumen Products (P) Ltd ..	50	—	50
53	T.I. Miller Ltd	162	—	162	58	Wavin India Ltd	131	—	131
58	National Electricals	120	—	120	58	Lanties Machine (P) Ltd	16	—	16
58	Modi Electrical Manufacturing	58	—	58	58	Rockwell Electrodes India Ltd ..	38	8	46
58	Alvitta Electricals (P) Ltd	39	—	39	58	Polythene Film Industries (P) Ltd ..	23	5	28
58	Nu-wood Pvt Ltd	39	1	40	58	Wig India (State)	171	467	638
50	K. G. Rohini Industries	14	—	14		<i>Electricity, gas and steam</i>			
58	India Meters Ltd	432	117	549	50	Korattur Sub-station (State)	35	4	39
	<i>Transport equipment</i>				50	Asiatic Oxygen	68	2	70
58	Madras State Transport Depot, Ambattur Depot (State)	(Not received)			58	Indian Oxygen	71	—	71
						Total	16,100	1,369	17,469

SOURCE : Office of the Inspector of Factories, Madras I Circle.

N.B. : (i) The Postal Circle Number '53' to be read as Madras-53 (Ambattur); '58' as Madras-58 (Ambattur Industrial Estate); and '50' as Madras-50 (Padi).

(ii) All factories except the ones marked 'State' are in the private sector.

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Ambattur: A statistical profile

Large-scale industrial undertakings as of 1969

Name of undertaking	Year of licensing or establishment	Products manufactured	Name of undertaking	Year of licensing or establishment	Products manufactured
I. Cycles of India ..	1949-50	Bicycles and bicycles components.	India Meters Ltd	1961-62	House service meters.
Unlop Rubber	1956-57	Cycle tyres and tubes; automobile tyres and tubes.	Southern Switchgear ..	1962-63	Low voltage switchgears, motor starters, iron-clad switches, etc.
Wheels India	1959-60	Wheels for commercial vehicles, cars, jeeps and tractors.	Kerry Jost Tools	1962-63	Drilling machines.
The Wright Saddles of India.	1959-60	Bicycle saddles.	Marshall, Sons and Co ..	1962-63	Paver finishers, stone crushers, etc.
I. Diamond Chain ..	1959-60	Bicycle and industrial chains.	Indian Oxygen Ltd	1963-64	Welding electrodes.
trac Pharmaceuticals ..	1959-60	Penicillin and streptomycin.	Wavin India	1963-64	Hard PVC pipes and fitting and PVC compounding.
mega Insulated Cables ..	1960-61	PVC and VIR cables, paper insulated power cables, ACSR and AA conductors.	Tata Fison Industries ..	1964-65	Dust formulations, wettable powders, copper fungicides dust, etc.
icas T.V.S. Ltd	1960-61	Starter motors, dynamos, horns, head lamps, voltage regulators, etc.	The Britannia Biscuit Co. ..	1965-66	Biscuits.
I. Miller Ltd	1960-61	Lamps for autocyces, scooters, etc.; bicycle dynamo lamps.	Asiatic Oxygen Ltd.	1965-66	Oxygen, dissolved acetylene.
India Forge and Drop Stampings.	1961-62	Steel forgings and drop stampings.	Sivanandha Steels	1965-66	Steel castings.
ndaram-Clayton Ltd ..	1961-62	Exhausters, compressors, etc. for automotive and non-automotive units.	Madras Industrial Linings..	1967-68	Rubber lining of equipment.
akes India	1961-62	Complete brake system for automotive and non-automotive units.	Gordon Woodroffe	N.K.	Collets and feed fingers.
			B. T. Shankar Hedge ..	N.K.	Oscillators, frequency dividers etc.
			Sundaram Fasteners ..	N.K.	H.T. bolts, nuts and rivets.

SOURCE : *Directory of Large-scale Undertakings in Tamil Nadu* (1969); Department of Industries, Government of Tamil Nadu.

N.K. = Not known.

Ambattur: A statistical profile

Small-scale industrial units registered as on March 31, 1972 (Ambattur units as on December 31, 1967)

Classification of Industry	Chingle- put district	Am- battur complex as on Dec. 31, 1967	Madras city	Total for Tamil Nadu	Classification of Industry	Chingle- put district	Am- battur complex as on Dec. 31, 1967	Madras city	Total for Tamil Nadu
Coal, coke and lignite	1	—	7	15	Knitting machines and their com- ponents	—	—	—	1
Iron and steel	634	21	1,377	5,134	Small tools	—	—	11	12
Mathematical, surveying and draw- ing instruments	2	—	3	5	Hand tools	1	—	2	12
Scientific instruments	10	2	1,400	1,495	Glass and ceramics	169	8	69	477
Mineral oil	14	—	4	32	Dyestuff	3	—	3	32
Ships and other vessels	—	—	1	3	Soap washing toilet	17	—	102	373
Sugar industry	3	—	1	38	Cosmetics and toilets	61	—	421	652
Telephone, telegraphic equipments, Textiles	1	1	3	5	Timber products	3	—	31	103
Automobiles and ancillaries	24	1	177	2,340	Ferro manganese	—	—	2	2
Tractors, harvesters and spares	85	9	254	892	Food products	105	4	421	1,848
Cement and gypsum products	3	1	5	22	Matches—fire works	7	—	—	946
Electric lamps	87	1	83	720	Wooden articles and furniture	35	—	138	785
Electric fans	6	1	8	26	Electrical accessories and equip- ment	58	13	191	490
Electric motors	2	—	2	8	Plastic and polythene products and plastic moulded goods	86	11	332	705
Chemicals and fertilisers	4	—	7	151	Wall clocks, watches and compo- nents	1	—	12	20
Machinery used in industries includ- ing boilers and steam generating equipments	166	4	345	1,072	Paints and varnishes	26	3	77	222
Ball, roller and tapered bearings	42	7	121	536	Fountain pen and other writing materials	9	—	38	120
Railway locomotives	—	—	1	3	Cine projectors and photographic goods	5	2	36	89
Railway rolling stock	—	—	3	5	Refrigerators and air-conditioning equipment	4	—	14	28
Machine tools	41	16	51	145	Printing industry	23	—	463	1,303
Equipment for generation, trans- mission and distribution of electric energy including trans- formers	6	1	15	51	Optical goods and lenses	10	1	50	74
Non-ferrous metals and alloys	124	10	319	1,217	Poultry appliances	—	—	3	4
Paper and paper products	46	6	185	489	Beverage such as coffee, sacharine..	5	—	55	400
Pharmaceuticals and drugs	21	2	73	195	Tobacco and tobacco products	1	—	4	98
Fermentation industry	2	—	—	16	Grinding wheels and abrasives	2	1	1	12
Rubber goods	33	5	58	260	Typewriting, calculating machines, cyclostyle machines and other office requisites	1	1	7	12
Leather, leather goods and pickers..	84	—	83	508	Weighting machines	2	1	2	13
Glue and gelatine	1	—	1	17	Industrial instruments	3	1	15	24
Vanaspathi	—	—	1	5	Gold and silver articles jewellery..	—	—	6	58
Vegetable oils including solvent extracted oil	10	—	18	282	Musical instruments	—	—	2	3
Agricultural implements	56	—	280	931	Stationery articles	—	—	6	30
Batteries, storage for cell	2	—	10	32	Mat weaving (power operated)	—	—	1	10
Bicycles and parts thereof	11	1	19	104	Miscellaneous industries such as beedi industry	21	3	168	662
Hurricane lantern	—	—	2	7					
Prime movers	1	—	12	49					
Power-driven pumps	2	—	9	153					
Radio receivers	11	2	87	210					
Sewing machines and their compo- nents	1	—	2	7					
					Total	2,194	140	7,710	26,789

SOURCE: Office of Director of Industries and Commerce, Madras.

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Paints and varnishes

— A FEATURE

Advances in varnish technology

By G. S. Gill and P. M. Gupte

A VARNISH can be described as a transparent viscous liquid which when applied as a thin coating solidifies into a hard lustrous film and protects the surface without obscuring it. Varnishes can be broadly classified into three categories:

Oil varnishes: These are combinations of resins and drying oils, suitably modified to get desired properties. These dry initially by evaporation of solvent and harden by the chemical changes that take place in the oil on exposure to atmospheric air, thus forming a durable protective coating.

Spirit varnishes: These are solutions of resins in volatile solvents, and dry entirely by evaporation of solvent leaving a thin layer of coating which is hard but soluble in the original solvent.

Water varnishes: These are solutions or emulsions of a resin or glue in an aqueous solution and become more or less insoluble on drying.

Here we shall limit our discussion to the first category only, that is, oil varnishes, starting with its historical background. The use of drying oil dates back thousands of years to the earliest periods of recorded history. No clear information is available as to when it was

first discovered, but linseed oil which, when heat treated dried more quickly, was certainly used in the inks in the middle ages. With the increasing demand people started experimenting to improve the drying of linseed oil. It is difficult to say when driers were first used but as early as the second century the accelerating effect of metal oxides on the rate of drying of vegetable oils was recorded by Galen.

By the end of the 18th century and more so in the 19th century, advances were made and speculative additives were eliminated. However, in the 20th century truly spectacular developments took place with the introduction of a spate of specialised products, such as the chemically modified natural resins, oils and synthetic resins. So much so that it has become a problem in itself to make the best choice from the large number of alternatives that modern science and technology have provided.

The main constituents of varnish can be listed as:

(i) **Film former:** These are mainly resins or oils. Resins provide hardness and lustre to the film and drying oils provide elasticity and other protective properties to the film.

(ii) **Solvents:** These help to adjust the consistency for application.

(iii) **Additives:** These are driers, which regulate and accelerate the drying of a film of varnish.

Resins are classified according to their origin, that is, natural and synthetic. Natural resins are used since many years in varnish-making. The important ones still in use include rosin, dammar, shellac and gilsonite. Rosin is the most widely used natural resin which gives highly lustrous films suitable for cheaper varnishes. The drawbacks with the rosin are its high acidity and poor outdoor durability. Satisfactory varnishes are prepared by treating the rosin with lime or esterifying with glycerol or pentaerythritol. Rosin is used in fairly good quantities for modifying the properties

of synthetic resins like alkyds.

Synthetic resins as the name implies are resins produced by synthesis of pure substances. The manufacture of varnishes has been greatly influenced by the introduction of many varieties and combinations of synthetic resins. Some important synthetic resins are: Alkyd resins, phenolic resins; maleic resins, amino resins, vinyl resins and acrylic resins.

Alkyd resins: The word alkyd was coined by Kienle from the two words *alcohol* and *acid* to include the complexes resulting from the reaction of polyhydric alcohols and carboxylic organic acids, such as the polybasic acids and their anhydrides. This term today covers those resins based on phthalic

The growth of paints and varnishes industry

Year	Paints and varnish		Nitrocellulose lacquers	
	capacity	production	capacity	production
	('000 tonnes)		('000 litres)	
1951	64.8	33.5	..	..
1956	64.8	41.6	..	..
1961	86.4	59.1	3,600	1,776
1966	106.0	67.2	3,360	2,076
1967	106.0	79.5	3,360	1,944
1968	77.5	65.5	2,484	1,872
1969	77.5	62.4	2,484	2,571
1970	NA	66.0	NA	1,973
1971 (a)	NA	69.0	NA	1,860
Annual compound rate of growth between 1951 and 1971 (per cent) ..	1.0 (b)	3.7	—3.3 (c)	2.8 (d)

NOTES: NA=Not available.

(a) Estimated.

(c) Relate to 1958 and 1969.

(b) Relate to 1951 and 1969.

(d) Relate to 1958 and 1971.

SOURCES: Central Statistical Organisation, Department of Statistics, *Monthly Statistics of the Production of Selected Industries of India*, for November and December 1962, Vol. XIV, Nos. 11 and 12, and November and December 1968, Vol. XX, Nos. 11 and 12, and January and February 1969, Vol. XXI, Nos. 1 and 2, and various issues, Calcutta.

Mr Gill is Technical Executive and Mr Gupte is Research and Development Chemist in Noble Paint and Varnish Co Pvt Ltd, Bombay.

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anhydride or some similar acid condensed with poly alcohol and modified with a drying or a non-drying oil.

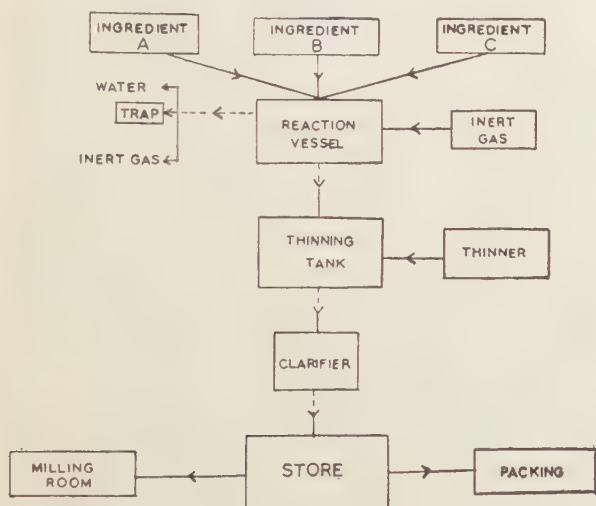
Phenolic resins: These are extensively used in oleoresinous varnishes. Phenolic resins are classified as follows: (i) modified phenolic—usually rosin is the modifier, (ii) 100 per cent phenolic—oil soluble type, and (iii) baking phenolics.

Phenolic resins are the reaction products of a phenol and an aldehyde with or without modifier. Different

These include polystyrene, polyvinyl chloride and synthetic rubbers.

Organic liquids are largely used in the manufacture of paints and varnishes as volatile solvents to lower the viscosity, to facilitate the application and to give stability to the resin. After the material is applied to the surface the solvent is no longer required and an essential feature of this type of solvent is complete volatility at ordinary temperatures. The solvents are conveniently

Chart 1



desired properties are obtained by modifying phenolic resin or changing the proportion of ingredients producing phenolic resin.

Amino resins: This is a term used for the class of resins based chiefly on urea-formaldehyde and melamine-formaldehyde condensation products. Amino resins are heat convertible type and are mostly used in baking coatings. It is fortunate that amino resins are compatible with a wide range of alkyd resins, because the combination produces films with excellent properties. Amino resins combine with non-oxidising alkyds to give coatings of high quality. They are also used with non-oxidising alkyds to reduce the baking time and to improve surface hardness and alkali resistance of films.

Vinyl resins: These are substituted ethylenes and their many copolymers.

divided according to their boiling points—low boiling—below 100°C; medium boiling—from 100°C—150°C; and high boiling—above 150°C.

Driers are special additives which regulate and accelerate the drying of varnish or paint film. Driers are heavy metal soaps of organic acids. At present a variety of organic acids are used and their metal soaps are available as driers. The naphthates and octoates are the most stable driers commonly used. The driers of interest are the naphthates and octoates of metals such as cobalt, zinc, lead, manganese, calcium and rare earth.

The operations involved in the manufacture of a varnish, which also is a vehicle for paints is easily illustrated in chart 1.

The unit operations that go into the manufacture of a varnish are:

Material handling (While

PROFILE

Paints and varnishes

THE organised sector in the paints industry consists of 18 units all registered with the Director General of Technical Development. In 1971 the production totalled 67,995 tonnes as against 65,217 tonnes in 1970, and 62,106 tonnes in 1969. The industry whose saleable production is estimated at Rs 70 crores, is steadily recovering from the low production level of the recession period. Its current production is nearly 5,000 tonnes less than the peak reached in 1963. A study of the finances of the major paints units shows that sales have been increasing at the rate of 12 per cent per year for the past two years. The gross profits have also gone up.

The paints industry has been complaining about the shortage of raw materials. Glycerine has been in short supply because, according to the industry, a large amount of the material was not recovered by soap makers in the small-scale sector. The industry has urged the Government to take early action to make arrangements for splitting fat at important centres for recovery of glycerine. The steel balls of required quality are also not available.

Almost all the important raw materials have been canalised through the State Trading Corporation, and the industry says that it has accepted that canalisation has come to stay. But it wonders why the STC should not be able to provide raw materials in time and of required quality. There has been a mark-up on account of the STC's expenses, overheads and profits, and also by way of distributor's commission on the ex-godown sales. Among the raw materials imported by the STC, the shortage of pentaerythritol is acutely felt by the industry. The indigenous sources are not able to provide material of the required quality. The industry has pleaded that the STC should plan import of the item in sufficient quantity. As regards imports of titanium dioxide the position is somewhat comfortable. The industry, however, does not want the Government to take any hasty decision to ban or restrict import of the material because of the proposal of the Travancore Titanium Products to manufacture this item until it was found that adequate supply would be available indigenously.

On the export front, the industry's performance has not been very satisfactory. Included in the list of priority industry, it carries an obligation of a 5 per cent compulsory export. In 1970-71, exports of paints and allied products amounted to Rs 4.81 crores out of which export of paints accounted for Rs 3.30 crores. If, however, exports in open international competition are considered, they amounted to Rs 33 lakhs representing only ten per cent of the total paint export. The f.o.b. value of the exports of the paints industry is less than 2.5 per cent of the value of production of the industry.

Though science-based, the industry has not invested significantly on research. Currently research on 'chlorinated rosin' is being done at the Bombay University's Department of Chemical Technology.

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charging, thinning and for finished product.)

Material transfer (Into kettle, reaction vessel, thinning tank, clarifier, milling room, finished goods godown.)

polycondensation (process.)

Heat transfer.

Fixing.

Filtration.

The above picture is an idealised one since no account is taken of such procedures as production control and quality control.

Alkyd resin constitute the bulk of the varnishes produced by any varnish manufacturing unit.

The common raw materials involved in the alkyd manufacture can be divided into three groups:

(i) polyhydric alcohol such as ethylene glycol, glycerol, pentaerythritol; (ii) polybasic acids/anhydrides such as phthalic anhydride, maleic anhydride; and (iii) oils and fatty acid such as linseed oil, safflower oil, castor oil, dehydrated castor oil and coconut oil.

The manufacture of alkyd resins can be easily understood by referring to chart 2.

The outstanding property of alkyd resins is exterior durability for the entire group of resins. The oxidising type give good adhesion, dry fast and give tough films. Alkyd resins are characterised by their marked degree of gloss retention and flexibility and are much superior to normal resinous varnishes in this respect.

Alkyd resins are almost universally made by a 'batch' process. As no high pressures are necessary, large kettles can be safely used for alkyd manufacture. Stainless steel vessels are durable, give pale coloured products and can be easily cleaned. Hence they find universal application.

Direct 'fire' or gas heating is still continued as the electric heating is very expensive, but it is of interest to note that the best heating method is the vapour heating using 'dowtherm'.

Facilities for rapid cooling are necessary. Provision for escape of water formed is usually through a condenser to minimise the loss of glycerine. Provision of adequate agitation is necessary to obtain a uniform product and protect frothing and local charring. The introduction of inert gas is to protect the colour of the resin.

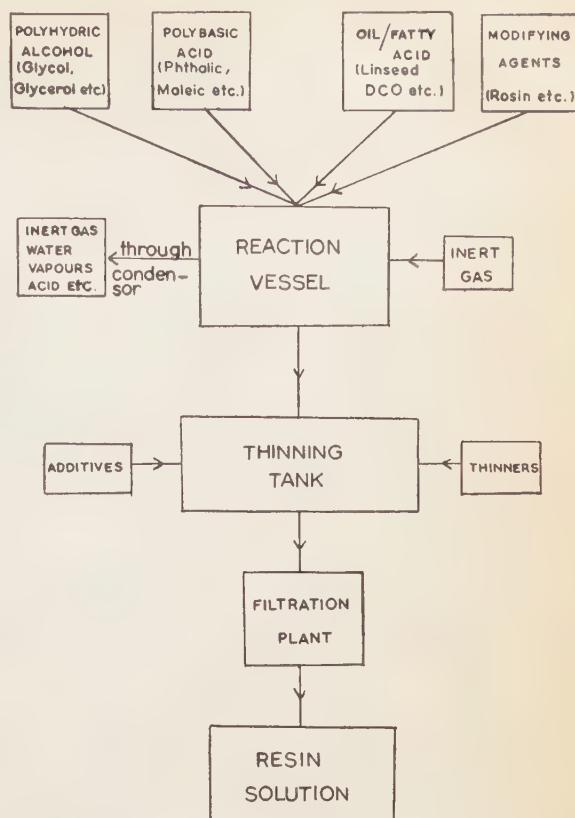
Uptil now we have seen the brighter side of the subject, that is, how varnish manufacturing technique progressed, but on the other side is the difficulty of procurement of raw materials for this industry. These difficulties have definitely hindered the production of varnishes and paints. Raw material shortage has become a perennial problem for the industry. One has to agree with the fact that at a time when our country is developing economically, such problems are bound to be there. The paint and varnish industry was initially confined to bring out limited types of products. But the demands made on the paint industry are now very varied. Other industries have started expecting more and more from the paint and varnish manufacturer for the decoration and protection of their products. This has given an opportunity for the paint technologists to widen their range of products. At present the paint industry in the country, is able to meet the surface coating requirements of a broad spectrum of industries. Naturally with the increase in demand the raw material supply position is becoming more and more acute.

The paint industry is one where raw material constitutes a major portion of price of the end product. The choice of raw material is also responsible for the performance of end product. So apart from the supply position the quality of raw material is also important. It will not be out of place to mention here that most of the raw materials used in the paint and the varnish industry are also used by other industries where they have not to pass

similar strict quality control standards. There is every reason to expect adulteration in raw materials when the sup-

busy man, and like a fortune teller is often required to look into the future, and with a crystal ball more complicated

Chart 2



ply position is so difficult and the prices fluctuating. This is a challenge thrown at the paint technologist. The paint technologist is now a very

ed than that of the fortune teller, his predictions are very near the mark, thanks to the laboratory facilities he controls. □

The growth of paint industry

By A Special Correspondent

PAIN is of utmost importance in the modern industrial development. It provides protection against rust and corrosion and prolongs the life of iron and steel in bridges, ships, and skyscrapers. Consumption of paint and varnish products by industry is thus an index of industrial activity. Paint sales are also an indication of building activity, for a greater part of the paint and varnish products sold through trade channels is used on

architectural surfaces.

The paint industry here grew with the chemical and engineering industries in the country. Its beginning as a modern industry dates back to 1890. For the first decade the production, however, was confined to the small-scale sector. It was at the beginning of the century that the first large-scale industrial unit was set up in Calcutta. Before the first world war, the needs of quality paints were met entirely by imports.



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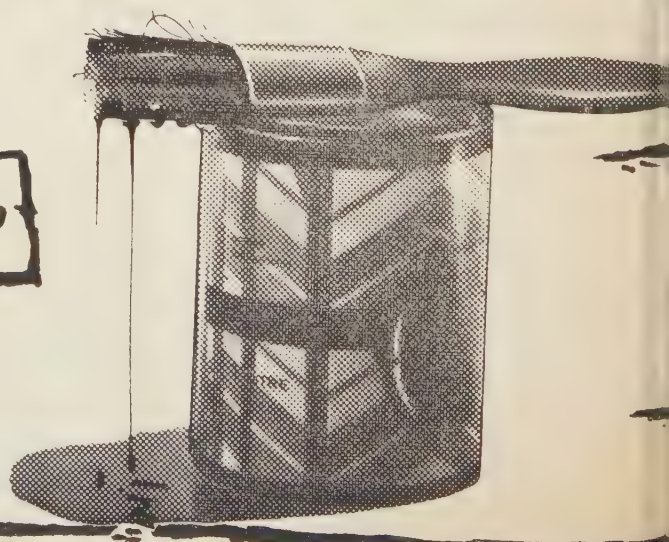
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indigenous industry be-
to take roots when for-
supplies were cut off and
estic demand increased.
Second World War pro-
d a fillip to the industry
the real spurt in growth
e during the post-inde-
pendence era.

the beginning of the
Plan the Planning Com-
mission had estimated that
there were at least 150 fac-
tories manufacturing paints,
varnishes and enamels. Two-
thirds of these units were in
the small-scale sector. The in-
dustrial capacity of the major
units, numbering 50, was then
estimated at above 65,000
tonnes on the basis of double-
shift working for 300 days
per annum. In 1951, the out-
put by important manufac-
turers was placed at about
100,000 tonnes. In 1957, the
industry was brought
in the purview of the In-
dustrial Development and
Regulation Act, and 25 fac-
tories with a capacity of
about 58,000 tonnes per an-
num were registered. The
Second Plan had fixed a target
capacity of 70,000 tonnes and
actual production at 60,000
tonnes for paints and var-
nishes. However, the produc-
tion fell far short of the tar-
get and was only 39,000 tonnes
in 1955. In the Second
Plan no increase in the capa-
city was envisaged. The Plan,
however, aimed at an increase
in the production of paints
and varnishes which was
fixed at 60,000 tonnes by
1961. The actual produc-
tion of paints and varnishes
in 1960 stood at 51,000 tonnes.
In the Third Plan, the re-
quirements of surface-coating
material was estimated at
about 1 lakh tonnes by 1966. But
the development of the in-
dustry, five years after the
start of the Third Plan, show-
ed that the production had
crossed the level of 70,000
tonnes.

According to official statis-
tics as at the end of 1971
there were 18 units in the
organised sector with an in-
dustrial capacity of 1.06 lakh
tonnes for the manufacture
of paints, enamels and var-
nishes. The actual production
in 1971 was, however, of the
order of 66,000 tonnes. The

value of the output was esti-
mated at Rs 28 crores. Im-
port of finished paint items
has been restricted and cur-
rently only some categories
of paint for export production
are allowed to be imported.

Apart from the strides
taken in the production of
paints there has also been a
significant progress in the
production of essential raw

materials for the paints
industry. Important among
these raw materials are pig-
ments, synthetic resins and
industrial solvents. A num-
ber of inorganic pigments
such as titanium dioxide, zinc
oxide, white lead, non-setting
red lead, yellow chrome,
prussian and ultramarine blue
are manufactured in large
quantities. The country has

also achieved a stage of indus-
trial self-sufficiency in respect
of synthetic resins such as
alkydes, phenolics, malerics,
melamine and urea formalde-
hydes which constitute the
base for the production of
high industrial finishes. An
extensive group of industrial
solvents, based on coal tar
and petroleum are also avail-
able in the country. □



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Ball and roller bearings industry

— A FEATURE

Achievements and goals

by A. K. Roy Chowdhury

THE rolling bearings industry in India has by now reached a stage where it can look to the future with confidence. The writer remembers the dim days of the past when there was only one pioneer unit engaged in the manufacture of ball bearings in the pink city of Jaipur. At that time, there were plenty of critics who would not consider it possible that mass-produced precision engineered article could be manufactured in this country. The critics included many foreigners also.

The most common argument was based on the fact that during the many decades of British rule this country had failed to make progress in such engineering industries. The raw material required for the industry had to be imported and the indigenous capacity, the critics said, would require many more decades to grow up, if at all it did. Some of them even pointed out that consuming industries were not in a position to fully utilise the output of even a single unit. In those days it took a great deal of boldness on the part of the Government of India and some far-sighted Indian industrialist who decided to go ahead with the production of bearings notwithstanding such apparently valid arguments. There were

many engaged in various industrial activities who automatically assumed that any bearings made in India should be inferior to the imported ones. The writer came across such objections throughout the country in the early days. It was heard frequently that the people manning the machines in this country were not capable of giving correct or sufficient care to make the bearings. Many others were apprehensive that the heat treatment may not be proper. The fact that Indian bearings enjoyed tariff protection and their higher prices owing to various reasons contributed in no small measure in strengthening the opposition to Indian-made bearings. Many were genuine well-wishers of the Indian industry, but many critics also included people connected with the import of bearings in the country.

However, gradually many of the high ball bearings consuming industries such as automobile manufacturers increased their production facilities. The bearings produced in India gradually started being used in increasing quantities. The Planning Commission assessed the requirement of bearings in the country, and as a result several more units were licensed to produce the bearings. Apart from popular sizes of ball bearings, capacities for manufacture of cylindrical roller and taper roller bearings as well as barrel roller bearings and needle roller bearings

were licensed. All the units were licensed to produce bearings in technical collaboration with well-known foreign makers.

By this time the protective tariff was withdrawn. Substantial capital outlays were called for and expensive

equipment was installed in various units manufacturing bearings all over the country.

Owing to the shortage of foreign exchange many of the bearing-consuming industries had their imported components cut or severely restricted to enable defence and food to enjoy higher priority. Such industries had to seek more and more items required by them inside the country, and in the bearing industry a

Growth of ball and roller bearings industry

(Lakh numbers)

Year	Capacity	Production	Capacity utilisation (per cent)
1951	6.0	2.3	38.3
1952	6.0	4.2	70.0
1953	6.0	6.5	108.3
1954	6.0	7.0	116.6
1955	6.0	8.1	135.0
1956	6.0	10.4	173.3
1957	6.0	15.8	263.3
1958	6.0	21.3	355.0
1959	9.0	17.0	188.9
1960	9.0	27.0	300.0
1961	9.1	32.2	353.8
1962	32.4	39.1	120.7
1963	57.0	49.5	86.8
1964	89.0	58.8	66.1
1965	115.8	82.5	71.2
1966	115.8	92.4	79.8
1967	121.4	100.7	82.9
1968	127.4	121.9	95.7
1969	172.4	134.1	77.8
1970	158.9	175.0	110.1
1971	189.1	190.0	100.5
Annual compound rate of growth between 1951 and 1971 (per cent)	18.8	24.7	..

- SOURCES: 1. For the years 1952 to 1968, Central Statistical Organisation, Department of Statistics, *Monthly Statistics of the Production of Selected Industries of India, for November and December 1962, Vol. XIV, Nos. 11 and 12, November and December 1963, Vol. XX, Nos. 11 and 12, and January and February 1969, Vol. XXI, Nos. 1 and 2, Calcutta.*
2. For the years 1969 to 1971, Ministry of Industrial Development, Government of India, *Annual Report 1970-71 and 1971-72, New Delhi.*

Mr Chowdhury is Technical Director of the Anti-friction Bearings Corporation Ltd, Bombay.

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crash programme had to be undertaken for achieving adequate capability to meet the requirement of the consuming industries. The position became particularly critical when it was found that various aid-giving nations started throwing their weight against us. The Indian industries, therefore, had to rise to the occasion and start supplying the requirements of industry and of the defence. Various automobile manufacturers had to depend more and more on the output of the Indian rolling bearing industry for meeting their requirement of bearings. The result of this has been extremely beneficial to the automobile industry which achieved significant success and generated the required confidence on them of the country. Largely as a result of the measures adopted after the 1965 Indo-Pakistani war the shock involved in 1971 Indo-Pakistani conflict was more easily absorbed in spite of the implied threat of involvement of one of the super powers. As a result of meeting the challenge of 1971, the industry has every reason to feel confidence in its own future for not only meeting the requirement of the country but also of sharing foreign markets. From the time Indian industries started manufacturing bearings many innovations were introduced to improve the quality of the product, and to cut down the cost.

Owing to the limitations imposed by the initial restricted plan of output for many units resulting in their being saddled with less economical and sophisticated equipment, no significant development in the manufacture of special purpose machine took place in this country. Therefore, replacement of old and sometimes outdated machines could not be carried out. In spite of all these handicaps the industry by and large has been able to improve the quality of workmanship and keep consuming industries supplied with their requirement.


days when some of the foreigners employed in some leading Indian industries were giving their opinion rather freely, that the load carrying surfaces of some foreign bearings were superfinished and as such those bearings are better able to carry the load and

hence have better performance than those made in this country. This is hardly borne out by experience. However, to accept the challenge the Indian rolling bearing industry rose to the occasion, and today some of the products marketed by the Indian industry are at least equal to the

finish of the bearings of foreign manufacturers. As all the units engaged in the manufacture of rolling bearings have a plan for expansion, it is confidently expected that on the completion of this expansion, the output of the Indian industry would compare so favourably with

BENSONS

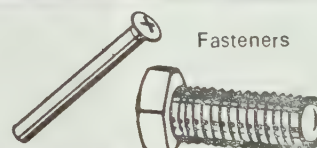
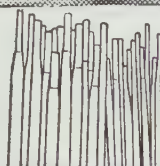
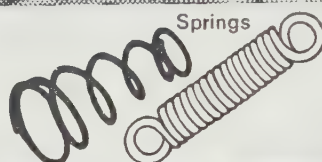
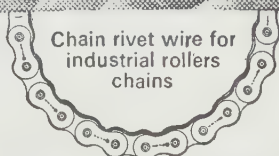
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foreign bearings that it will not be too difficult to achieve substantial export performance.

It would seem that industries engaged in the manufacture of electric fans and electric motors have their complete requirements met by the Indian industries. The automobile industry which is engaged in the manufacture of cars and trucks is drawing practically all its requirements indigenously. There are quite a number of tractor units which are gradually coming into production and the requirement of their bearings also are met from the Indian manufacturers to a large extent.

Although the machine building industry is supplied with quite a substantial part of its requirement of bearings, conforming to normal class of tolerance, its requirement conforming to precision class is not met by the Indian producers at the present moment in any significant quantity. Most of the requirements of the machine building industry require bearings of semi-precision class which is designated as tolerance class 6. The writer believes that in emergency conditions this class of bearings can be supplied by the Indian producers although the cost may prove to be high. If a rationalisation is effected to cut down the diversity of sizes, then the machine building industries can pool their requirements into economic production batches for bearing makers.

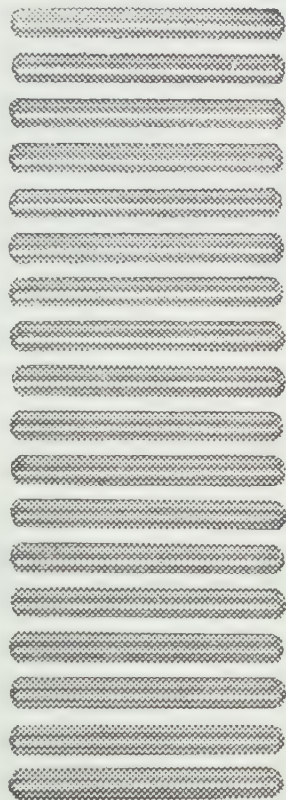
Regarding the manufacture of higher precision classes such as classes 5, 4 and 3 very important applications are involved for bearings belonging to these tolerance classes. The internal grinding spindles will be made in future in ever-increasing quantities, which in turn require more bearings belonging to tolerance class 4 and, in some instances, to tolerance class 5. Large units for the manufacture of grinding machines are expected to go into production soon and therefore our

dependence on foreign sources of supply for these important bearings have to be eliminated. The manufacture of these bearings in sizable quantities require special facilities. The desired result cannot be achieved by selection from normal batch of

production. All these can only apply after it is established that the economic batch for the manufacture of such bearings can be consumed by the machine building industries.

Instrument bearings are required for various instru-

ments belonging to tolerance class 3 in general but the requirement is small. It may not appear to be a good commercial venture to go into production with specialised equipment. These bearings are fitted in vital navigational instruments among other

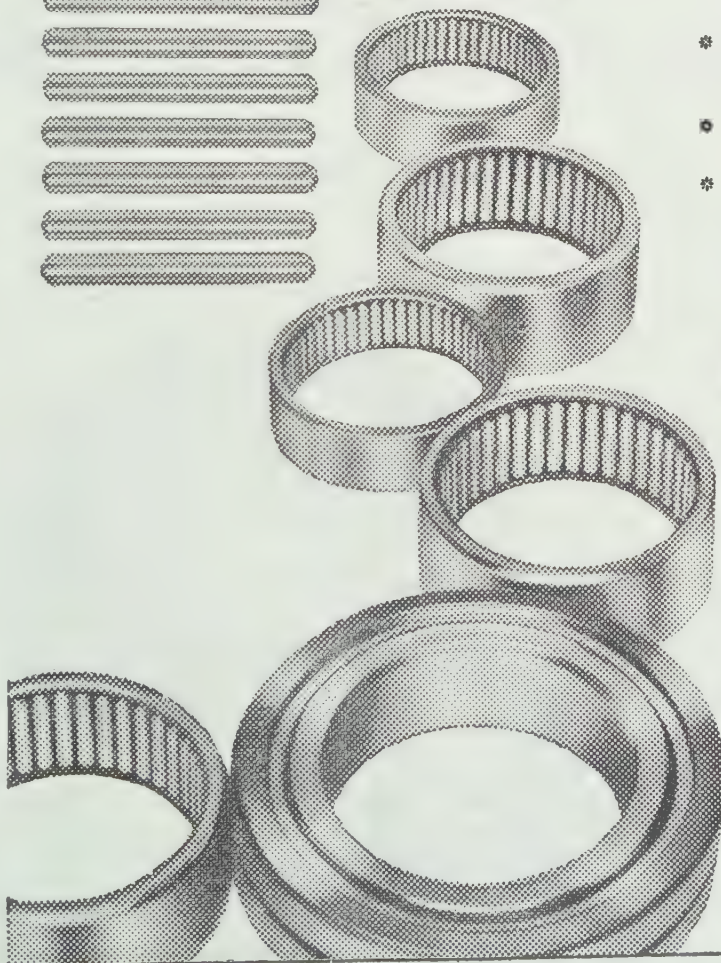


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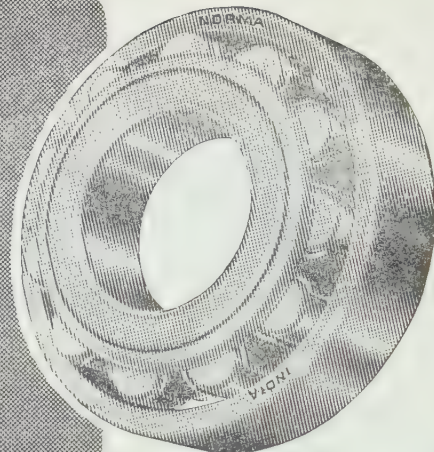
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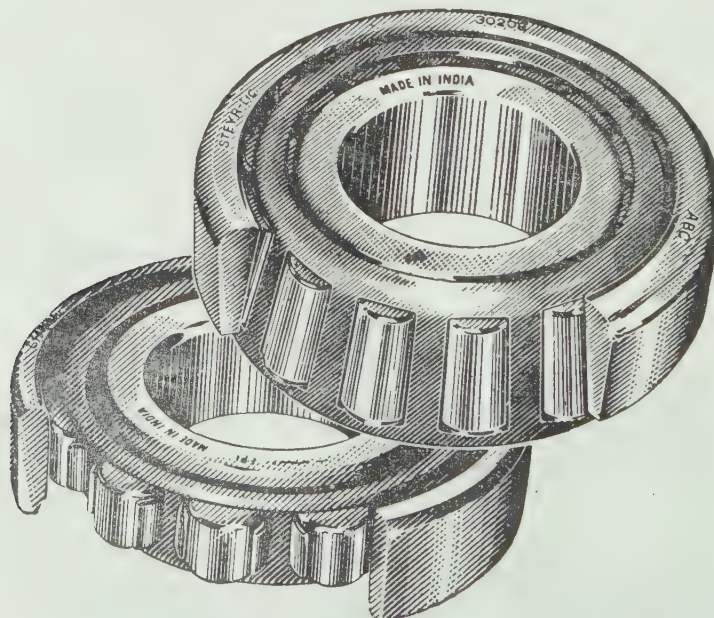
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ually important applications. Since defence requirements are involved, foreign suppliers at the moment of crisis may withhold the supplies thus holding the country to ransom. A solution to this problem has to be found since bearings are very vital parts of vital instruments. No doubt we are producing sophisticated aircraft for defence but to sustain them in combat-readiness instruments are vital.

A few observations regarding bearings required for aircraft applications may not be out of place. These fall into two important categories. The group of special bearings required for operation of aircraft control surfaces and the other group of bearings which is no less special, bearings to the engines—mainly jet engines. The aircraft control bearings (mainly ball bearings although in some countries needle rollers are favoured) are permitted to be loaded up to indenting loads under severe aerobatics and are called upon to maintain the rotation properties under severe and abrupt changes of climatic conditions. The engine bearings are called upon to function at a peak performance so far as loading intensity and temperature conditions are concerned. The necessity of keeping the weight to the minimum helps to make the conditions more severe. The jet engine bearings are expected to function at high speeds and at high temperatures, sometimes under periodically reversing loads. Not only special designs of components are called for but special lubricating arrangements, which also carries out heat, is required. Special material with high metallurgical purity is desired. Special control has to be imposed from the initial stage of steel making to the final stage of bearing assembly. The testing operations on sample bearings will be also almost continuous. These special bearings are required in moderate quantities at the present moment, but they are of so vital importance that

the manufacturing capability is essential to get rid of the dependence on imported bearings. This matter has to be thoroughly investigated and a solution found so that manufacturing capability of the bearings is made available in this country as quickly as possible.

There are other special classes of bearings which have come to be used in the modern world. These are used in various equipment associated with rocketry. Informations on the design and performance are classified. With the increasing use of rockets for defence and scientific purposes eventual high priority for the manufacture of suitable bearings may have to be considered in not too distant a date.

Although many of the standard bearings required by the shipbuilding industry are manufactured in this country, some special marine equipment requiring bearings are not being catered for. These have to be provided as the shipbuilding industry in India makes further progress. Here also requirements for defence have to be kept in mind.

The metallurgical industry, the paper industry and several other processing industries require special types of bearings, the manufacture of which has not yet been initiated in this country. These are larger bearings required in small quantities, which cannot be considered for mass production at present.

The requirements of the Railways, particularly of the axle box bearings, have been met substantially by the bearing industry and it is a matter of satisfaction to note that the industry can cater to the bearing requirements for rolling stock intended for export.

Mention has been made earlier about the limitations of equipment and machinery at present used by various units engaged in the manufacture of bearings. As all the units are engaged in plans to expand their manufacturing

facilities, it is expected that plant and machinery which are to be installed will not suffer from limitations of productivity and workmanship. With the installation of high productive and high quality equipment we may be able to make our products more and more competitive.

So long as we continue to be dependent on import of raw material for the manufacture of bearings, we shall continue to be handicapped against foreign manufacturers who get their raw material practically next door. A start has been made to roll bars of bearing steel in the country from Indian steel. It may, however, take quite some time to install tube-making capability in the country. Even when such items are available here, the price factor of raw material will continue to remain adverse. The expanding bearing industry will have to take these factors into consideration and make proper plans to neutralise their effect on the competitive ability of Indian bearings. The sooner plans on these lines are given effect to, the better will be the position of the industry.

In view of the fact that the industry is called upon to make maximum utilisation of resources, a dependable study and analysis of consumers requirements is a necessity to plan the utilisation of resources. In the case of export such studies are more essential since, if supplies in foreign market are made in a haphazard manner, the regularly consuming industries abroad will not be in a mood to make a permanent arrangement. In this respect, the example of the Japanese manufacturers and exporters is worth emulating. In expanding such export markets the writer is convinced that representation of the industry, export houses and banks should be of Indian personnel alone although foreign help to a certain extent has to be taken.

It must be realised that a bearing being a precision en-

gineered article, it requires a high grade of technical service. This the manufacturers' representative is best able to deliver. Sometimes in boosting foreign sales help of local people has to be taken, but the presence of manufacturers' representatives cannot be eliminated. The technical service during the introductory period must be very liberal so that the customer can feel that the makers can be relied upon to look after them and assist them in their difficulties. It has been reported that the Japanese representatives even go so far as to arrange for credits for their customers. The help of various government departments, beginning from passport authorities up to the commercial branches of embassies, has to be ensured. Other steps which can be taken after the ground work is over can be discussed and finalised.

It is clear that all types of bearings which are required in the country cannot be immediately made. Therefore in the near future it should be the effort of the bearing industry to earn partly or wholly the foreign exchange which is spent in importing the bearings not manufactured in this country. Furthermore, in order to keep pace with competitors in other countries the Indian bearing industry should be in a position to import latest specialised machine tools from any part of the world. Japan, the USSR and lately China are doing this in a big scale. A steady export performance of the industry could make the process of securing import licence for such capital goods easier. The technique which was adequate several years ago and in one set of market conditions may be a handicap to the manufacturers under the altered conditions of today. Therefore, there does not seem to be any alternative to modernisation, which in the present conditions entails responsibility to export. □

Rapid progress in production

By A Special Correspondent

THE ball and roller bearings industry has a good record to boast of during the past few years. The growth of the industry has come as a result of the growth in other engineering industries where ball bearings are used. Ball bearings are used for fitment in a number of industries manufacturing items such as electric fans, electric motors, power-driven pumps, automobiles, railway wagons, textile machinery, tractors and earthmoving machinery.

At the beginning of the Second Plan there was only one unit located in Jaipur. The installed capacity of the industry then was 6 lakh pieces per annum on a single shift basis. The production

was of the order of 10 lakh pieces. By the end of the Second Plan, the production exceeded 2.4 million pieces which was the target set for the Plan. There was sizable expansion in the capacity after 1962 when it reached a level of 3.2 million pieces and the production was 3.9 million pieces. In 1966 the capacity was 11.5 million pieces, and the production 9.2 million.

Currently there are seven units licensed for a total annual capacity of about 22.6 million pieces. The installed capacity as at the end of 1971 was 18.9 million pieces, and the production 19 million pieces worth Rs 20 crores. The annual compound

growth rate between 1951 and 1971 has been 18.8 per cent in respect of capacity, and 24.7 per cent in respect of production. In terms of capacity utilisation the industry has been performing well and currently the utilisation is 100 per cent in the organised sector. The Government has issued letters of intent to two companies in the private sector for the manufacture of ball and roller bearings. The capacity sanctioned for the new units is 11 million pieces. There are also 23 small-scale units whose total output in terms of value was estimated at Rs 72 lakhs in 1967. The anticipated production of the organised sector for 1973-74 has been placed at 21 million pieces. However, considering the growth in the installed capacity of the industry, and also utilisation of the capacity, it seems the industry would exceed the Fourth Plan target even before the end of the Plan period.

The demand for the various types of ball bearings is

growing rapidly. At the end of the Fourth Plan the demand is expected to rise by about 25 million pieces per annum.

Despite the rapid increase in indigenous production there are substantial imports of ball and roller bearings. In 1970-71 the imports were of the order of Rs 9.4 crores as against the indigenous production of Rs 20 crores. This indicates the large scope for import substitution. The import of certain bearings may be inevitable because their production may not be economical on the basis of the demand for those bearings. But there is no reason why a joint effort should not be made by the industry and the Government to identify the types of bearings which can be manufactured here. The export performance of the industry is rather poor: its earnings were hardly Rs 2 lakhs in 1970-71. A determined effort will have to be made to boost the sales in markets abroad.

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Pipes and tubes industry

— A FEATURE

Steel pipes: Growth problems

by A Special Correspondent

THE steel pipes and tubes industry, one of the important engineering industries in the country, has developed during the past two decades.

The variety in steel pipes and tubes is large and it covers size, wall thickness, kind of steel used, type of joint, protective coating, manufacturing process and end-use. Based on the manufacturing process, steel tubes can be categorised as welded type and seamless type. With the improvements in different welding techniques, namely, electric fusion welding, electric resistance welding and submerged arc electric welding, welded tubes are rapidly replacing the seamless type. The use of seamless type is at present mainly confined to selected special applications.

Welded tubes of diameter over 20" are used in India mostly for penstocks and primary water mains. These are generally made by plate fabricators. Line tubes used for main lines of water transmission are mostly of 10" and 12" in diameter, while those for oil lines are 8" to 20" in diameter. The Indian Standards Institution has developed standards for these tubes. Welded structural tubes and commercial tubes can be of various sizes. Commercial tubes used for conveyance of water and gas vary from 1½" to 2" in diameter. Those for agricultural purposes are usually of 3" and 4" size, and for the tubular poles the sizes used are 4" to 8". Special tubes used in the manufacture

of cycles, furniture, refrigerator equipment and transformers are generally made from cold rolled strips.

The pattern of industrialisation has a considerable influence on the level of demand for different end-products of steel. Broadly speaking, the demand for steel pipes and tubes grows in importance with emphasis on chemical and mineral oil industries in the scheme of industrial development. The somewhat steep increase in the demand for pipes and tubes in 1960 and 1961 was a consequence of the work on the construction of pipelines for oil (Naharkatiya-Barauni crude oil pipeline) and coke oven gas (Durgapur-Howrah pipeline for gas).

The pipes and tubes industry has been among the engineering industries where demand estimates have been on the high side. This resulted in sanctioning large capacities. As against the target of 9 lakh tonnes set for the Third Plan, the installed capacity of the industry at the end of the Plan was about 3 lakh tonnes per annum, and the level of production reached was of the order of 2.41 lakh tonnes. By the end of the Third Plan the industry was in good shape. The utilisation between 1960 to 1966 went up from 56 per cent to 96 per cent. This, despite the fact that about 1.2 lakh tonnes capacity was added during the six-year period. Then the downtrend started.

Encouraged by the boom conditions in the industry and the prospects of growth, more entrepreneurs entered the field. The capacities then existing were also allowed expansion. Between 1966 to 1971, the capacities have been doubled by 3 lakh tonnes. But in the corresponding period the production came down by 2.97 lakh tonnes to 2.18 lakh tonnes. It is not surprising that the capacity utilisation showed a sharp decline from 94 per cent to 36 per cent.

The National Council of Applied Economic Research in a study made in 1968 had estimated the demand for steel pipes and tubes in 1970-71 at 418,170 tonnes. This consisted of welded pipes 282,580 tonnes, seamless steel pipes 109,340 tonnes and seamless alloy steel pipes 26,250 tonnes. In its recent study, *Demand for Steel—*

Table 1: Growth of the steel pipes and tubes industry : 1960 to 1971

('000 tonnes)

Year	Steel pipes and tubes			Seamless tubes			Cast iron spun pipes		
	Capacity	Production	Capacity utilisation (per cent)	Capacity	Production	Capacity utilisation (per cent)	Capacity	Production	Capacity utilisation (per cent)
1960	187.3	104.7	55.9	..	..	..	..	..	..
1961	187.3	139.5	74.5	..	..	..	..	..	..
1962	187.3	155.5	83.0	..	..	..	..	..	..
1963	239.4	214.9	89.7	..	..	..	196.1	188.3	96.0
1964	281.9	234.2	83.1	30.0	15.2	50.7	193.0	207.3	107.4
1965	272.2	235.5	86.5	30.0	16.7	55.7	280.0	243.9	87.1
1966	314.5	297.1	94.5	30.0	21.4	71.3	282.4	235.5	83.4
1967	409.3	220.0	53.8	30.0	23.4	78.0	330.4	166.1	50.3
1968	409.3	255.4	62.4	30.0	24.7	82.3	438.4	133.1	30.4
1969	470.5	300.0	63.8	39.6	27.0	68.2	438.4	120.0	27.4
1970	484.0	215.6	44.5	39.6	29.3	74.0	438.4	172.9	39.4
1971	601.5	218.3	36.3	39.6	34.3	86.6	N.A.	N.A.	..
Annual compound rate of growth between 1960 and 1971 (per cent) ..	11.2	6.9	..	4.0 (a)	12.4 (a)	..	12.2 (b)	-1.2 (b)	..

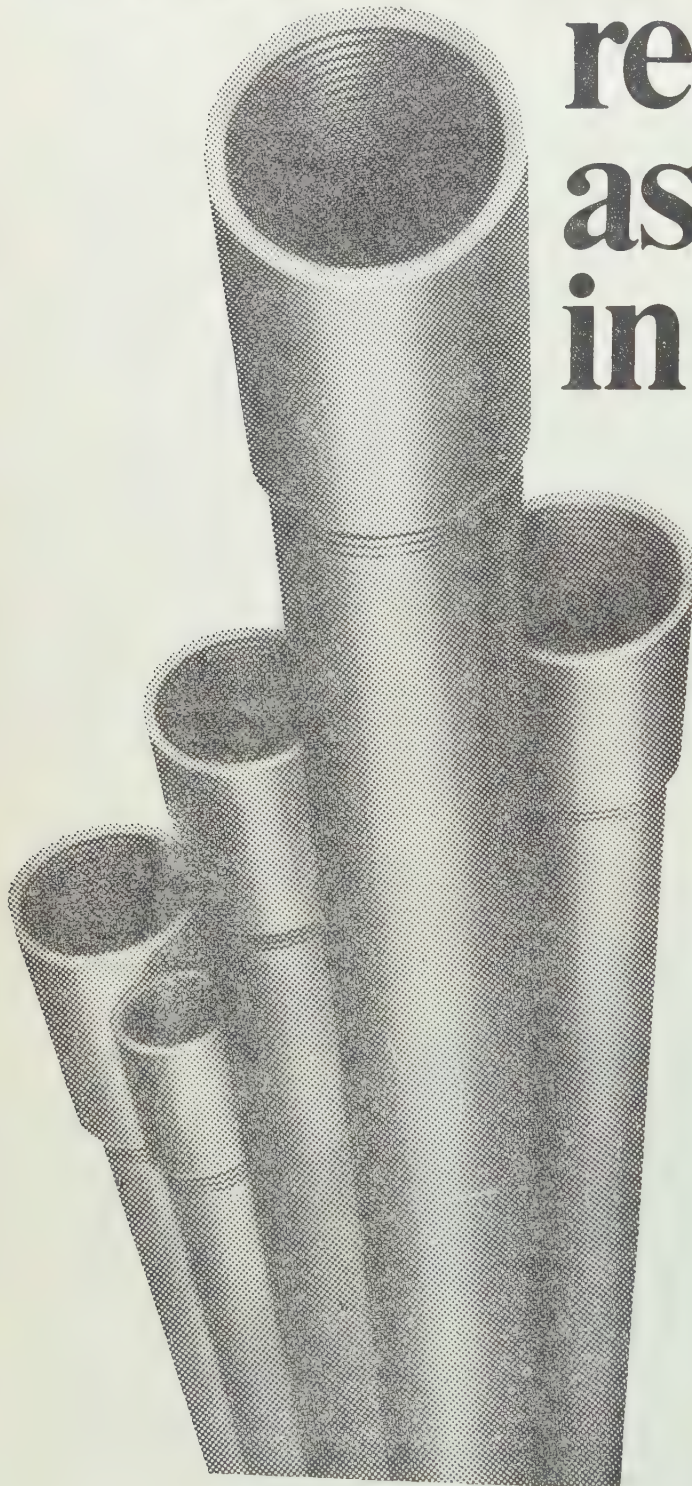
NOTES: N.A.—Not available.

(a) Relate to 1964 and 1971. (b) Relate to 1963 and 1970.

SOURCES: (1) For 1960 to 1967, Central Statistical Organisation, *Monthly Statistics of the Selected Industries of India*, New Delhi, Various issues.

(2) For 1968 to 1971, Ministry of Industrial Development, Internal Trade and Company Affairs, *Annual Report 1969-70 to 1971-72*, New Delhi.

Indian Tube receive Government's recognition as Pioneers in Exports



Indian Tube were among the recipients of Certificates of Merit awarded on 20th June 1972 by the Ministry of Foreign Trade, Government of India.

The citation states that Indian Tube, "pioneers in the export of M.S. Pipes and Tubes have gradually developed their exports to a large number of countries. Although conditions in neighbouring countries in the Middle East and South East Asia are more favourable for export of this product from India, the firm has made consistent efforts to sell pipes and tubes to countries like the U.K. and the U.S.A., which require these products to special specifications. Their exports have increased from Rs. 139 lakhs in 1966-67 to Rs. 188 lakhs during 1968-69, a growth rate not achieved by any other firm in this line during this period".

The certificate of Merit was awarded to the company "for being the best exporter of M.S. Pipes and Tubes" during the period.

HIGHLIGHTS OF THE COMPANY'S EXPORT RECORD —

In 1966-67, Indian Tube were not only the biggest Indian exporters of steel tubes but the biggest exporters in the entire field of engineering goods. In 1969-70, they established an all time record by exporting over 29,000 tonnes valued at Rs. 279 lakhs (f.o.b.) against 188 lakhs in the previous year, i.e. a growth of 48%.

The cumulative total of the company's exports upto 31. 3. 1972 is 116,000 tonnes valued at Rs. 10.77 crores.

INDIAN TUBE

THE INDIAN TUBE COMPANY LIMITED

A Tata-Stewarts and Lloyds Enterprise

CALCUTTA BOMBAY DELHI MADRAS AHMEDABAD KANPUR

1975 and 1980, the NCAER has estimated the demand for steel tubes in 1975 and 1980 for domestic consumption and for exports at 6.8 lakh tonnes and 11.8 lakh tonnes respectively. An item-wise breakdown of the aggregate demand is shown in Table 2. The Indian Engineering Association has expressed the

nous producers are quoted at prices ranging from Rs 1,400 to Rs 1,450 per tonne. A year ago these prices were lower by at least ten per cent. In the case of imported varieties the prices range between Rs 1,900 and Rs 2,000 per tonne. A year ago these prices were lower by more than Rs 300 per tonne. In the

Table 2: Sector-wise demand for steel pipes and tubes
(thousand tonnes)

	1969	1975	1980
Industrial offtake			
Seamless	23.1	47.6	101.6
Welded tubes	36.2	64.1	101.5
Non-industrial offtake			
Welded tubes	195.0	303.2	503.9
ERW pipes	38.0	60.0	100.0
Other large-diameter fabricated pipes	8.3	15.0	25.0
Exports			
Seamless tubes	2.1	10.0	20.0
Welded tubes	103.4	190.0	330.0

view that since the consumption of steel tubes is found to be related to the ingot steel production, on the assumption of the achievement of the Fourth Plan steel target of 10.8 million tonnes, the domestic demand for steel tubes may be expected to be around 7 lakh tonnes in 1973-74.

The steel pipes and tubes industry is worried about the raw material supplies position. The prices are going up. For 1,000 tonnes of steel pipes and tubes the steel coils needed are about 1,150 tonnes. The supplies from the indige-

case of raw materials supplies, imported materials constituted nearly 60 per cent. This inflated the cost of production of pipes.

The pipe manufacturers say that it takes nearly six months for them to get the imported quota of steel items. This is because steel is a canalised item. Owing to the shortage in domestic supplies the industry has to import steel. In the organised sector only one captive unit has been assured of steel supply. The others have to depend on imported supplies. Any cut

Table 3: India's exports of iron and steel pipes and tubes

Year	Exports of		Col. (1) as percentage of col. (2)
	Pipes and tubes (Rs. crores)	Engineering goods (Rs. crores)	
	(1)	(2)	(3)
1960-61	0.3	10.5	2.9
1962-63	0.1	14.9	0.7
1963-64	0.6	21.1	2.8
1964-65	1.3	26.5	4.9
1965-66	3.3	29.8	11.1
1966-67	5.1	31.1	16.4
1967-68	6.2	41.5	14.9
1968-69	11.6	85.0	13.6
1969-70	13.1	106.4	12.3
1970-71	9.3	116.6	8.0
1971-72*	7.5	125.0	6.0

NOTES: * Provisional.

Figures from 1960-61 to 1965-66 and for 1971-72 refer to M.S. pipes and tubes only (including fittings). Figures from 1966-67 to 1970-71 also include cast iron pipes and fittings, cast iron spun pipes and fittings.

SOURCES: (1) Indian Engineering Association, Engineering Export Promotion Council, *News Bulletin*, July 1969, July 1970 and September 1971.
(2) Indian Engineering Association, Engineering Export Promotion Council, *Home Bulletin* (various issues).

PROFILE

Pipes and tubes

PIPES and tubes are required for many purposes and for many industries. Water tubes and structural tubings, boiler and high pressure steel tubes, tubes for oil-well casings, ball bearing tubes and water-well tube casings, furniture tubes and bicycle tubes are some of the important types of tubes supplied by the industry.

Though pipe and tube-making has been known to man from the distant past, the industry as we know it today is about 150 years old. The pipes and tubes industry in the country is essentially a development after the achievement of Independence. Manufacture in the first decade of free India was largely confined to making pipes intended for conveying water, steam and gas, the traditional uses to which pipes have been generally put. Sophisticated pipe and tube making is a growth from the Second Plan onwards. With increasing industrialisation the demand for pipes and tubes has grown. As against the target of 9 lakh tonnes set for the Third Plan, the installed capacity of the steel pipes and tubes industry at the end of the Plan was about 3.08 lakh tonnes per annum. The level of production reached was 2.41 lakh tonnes.

By the end of 1971, the capacity of the industry was of the order of 6.01 lakh tonnes. The production during the year, at 2.18 lakh tonnes, was at the same level as in 1963 when the installed capacity was 2.39 lakh tonnes. The peak was reached in 1969 when the production touched three lakh tonnes. With the increase in capacity and fall in production, the capacity utilisation has come down to 36.3 per cent. The capacity utilisation has been showing a persistent downtrend and at the present level it has touched a new low. In seamless tubes the capacity is 39,000 tonnes and production 34,000 tonnes, indicating a utilisation of 86.6 per cent. For cast iron spun pipes the capacity in 1970 was 4.38 lakh tonnes, and production 1.72 lakh tonnes. The capacity utilisation was 39.4 per cent.

There are 14 units producing steel pipes and tubes. In the private sector units the range covered is from ½" to 6" in welded and seamless qualities. Hindustan Steel Limited manufactures tubes in 8 to 18 inches size range. Its capacity is 1.20 lakh tonnes per year.

It is estimated that by 1973-74 about seven lakh tonnes of steel pipes and tubes will be required for meeting the demand from industrial and other sectors. The Fourth Plan makes a provision of Rs 7.41 crores for the setting up of a seamless tube plant at Bhilai. It will produce tubes in sizes which are not made in the country at present.

The industry is one of the major earners of foreign exchange. The exports had touched a level of Rs 11.26 crores in 1969-70 but came down to Rs 7.01 crores subsequently.

The steel pipes and tubes manufacturers say that shortages in indigenous supplies of raw materials, particularly in skelp and hot and cold rolled strips, are the main constraints on the development of the industry.

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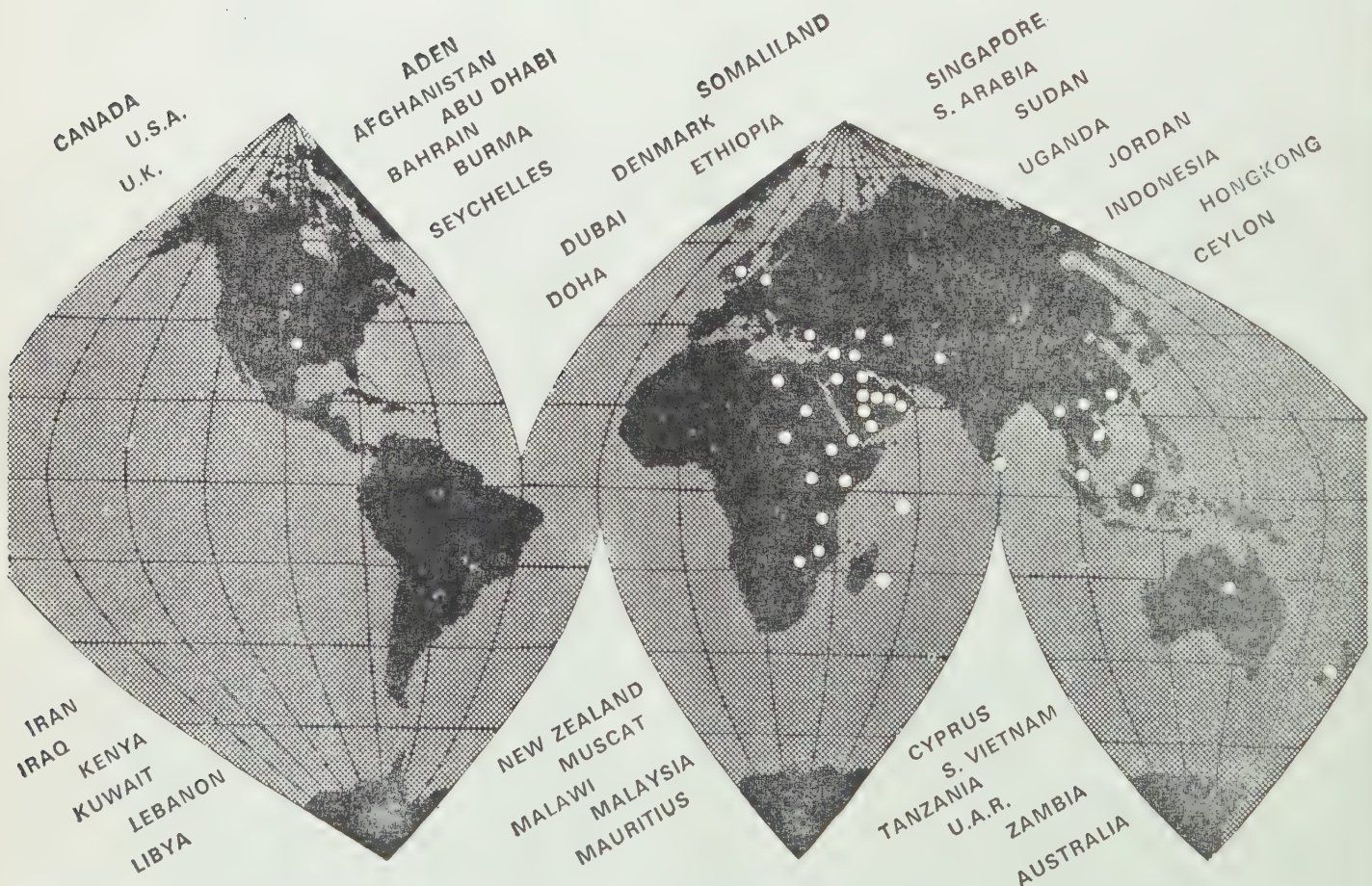
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the production by the public sector units in the needed quantities adds to the difficulties of the pipe manufacturers. Because of the delay in procuring the raw materials, the manufacturing units have to stagger the production. The factory has to be in production all round the year with the result the utilisation of the capacity is below 40 per cent.

The industry complains about the spare parts and tools required for its plants and equipment are not available at times.

There is no price control on steel tubes but the Government is a direct buyer of at least 20 per cent of the production. Any attempt to increase the prices is frowned upon by the Government's purchasing authorities. About 50 per cent of the pipes and tubes are purchased for water

vestment of about Rs 25 crores to Rs 3 crores.

There is sizable import of tubes and pipes, particularly in seamless and welded categories. In 1970-71, the imports of tubes and pipes other than cast iron were of the order of 30,434 tonnes valued at Rs 10.56 crores. These are mainly for oil wells and the chemical industry. Capacity has not yet been set up for production of some of these pipes. The demand for some of the imported items is not adequate to commence production here.

The target for the export of steel pipes and tubes has been set at Rs 15 crores to be achieved by 1973-74. The pipe manufacturers are confident of hitting the target provided the raw material supplies are assured. There is a great potential for export as demand for steel pipes and tubes is rising rapidly all

Growing demand for PVC pipes

By A Special Correspondent

THE shortage of steel and the increase in its prices led to a search for an alternative raw material. In the pipes and tubes industry an alternative has been found. Polyvinyl Chloride (PVC) has emerged as an alternative raw material. PVC is a hard, tough, transparent, thermoplastic resin characterised by high inherent strength. It can be plasticised to a straight degree of flexibility and still retain appreciable strength. It has an exceptional resistance to many chemicals such as alkalis, alcohol, acids and aliphatic hydrocarbons.

An important characteristic of PVC is that it can be processed by almost all the known methods of fabrication such as injection moulding, blow-moulding and extrusion. Because of its versatility PVC can be fabricated into products which are rigid, such as pipes, sheets, glass-like bottles or those which are flexible, such as shower curtains, table sheets and cables.

The history of PVC pipes dates back to 1930 when Germany first introduced them for transmission of potable water. Over the last 40 years these pipes have gained popularity the world over as material for potable water supply. These pipes are now extensively used in Japan, Italy, the UK, West Germany, Holland and the US. On a rough estimate, about 60 per cent of the new pipes used in Western Europe are rigid PVC pipes.

The first PVC pipe used in India, as a demonstration by a foreign firm, for potable water supply was at Chatrapur, about nine miles from Delhi, in 1962. Tamil Nadu was the first State to use rigid PVC pipes on a large

scale, in sizes ranging from 20 mm to 280 mm, for both rural and urban water supply schemes. The Tamil Nadu Housing Board is reported to have used over 200 km of PVC pipes in sizes ranging from 16 mm to 200 mm. The use of PVC pipes in other States followed suit. Jammu and Kashmir, Andhra Pradesh, Assam, Kerala, Mysore and Maharashtra have begun using PVC pipes in their urban and rural water supply schemes.

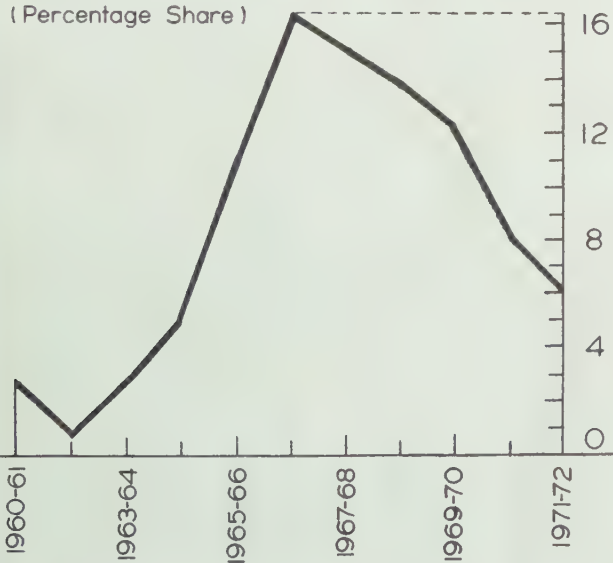
The commercial production of PVC tubes in India commenced in 1967. There are currently five major manufacturers according to the DGTD list: two in Bombay, two in Madras and one in Calcutta. The present utilisation of PVC pipes in our country for potable water supply is stated to be around 1,500 tonnes per year. By the end of 1973 this might go up to a level of 3,000 tonnes per year.

The approval by the Central Public Health Research Institute, Nagpur, and by the public health engineering departments of various State Governments has helped in encouraging the use of PVC pipes. The Indian Standards Institution laid down standards for PVC pipes in 1968. After satisfying itself that all the tests suggested by it are carried out properly, the ISI has permitted two manufacturing companies to use certification marks on pipes produced by them.

The PVC pipe manufacturers contend that there are many advantages in switching over to PVC pipes. The foremost is the cost factor. In the total cost of any water supply scheme 50 to 55 per cent is towards the cost of pipes. This can be brought

IRON AND STEEL PIPES AND TUBES IN INDIA'S ENGINEERING GOODS EXPORTS

(Percentage Share)



Commerce Research Bureau

supply and irrigation purposes, 20 per cent for structural uses and about 10 per cent for other uses by the industry.

The economic size of a unit of the steel pipes and tubes industry is about 30,000 tonnes per year. At the current level of prices this requires an in-

vestment of about Rs 25 crores to Rs 3 crores. over the world. In terms of quality the Indian products are accepted all over the world. A determined effort by the industry and the Government should help India boost up its export earnings on this item which currently account for six per cent of the engineering goods exports. □

Save upto 30% in plumbing cost with PVC Pipes*!



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Particulars	Cost of pipes & fittings	
	P.V.C.	G.I.
(a) Cost of pipes 25 mm 36 metres 20 mm 44 metres	Rs. 258.80	Rs. 426.48
Cost of fittings 25 & 20 mm	Rs. 89.81	Rs. 109.48
(b) Labour charges for installation	Rs. 105.60	Rs. 185.00
Total of (a) and (b)	Rs. 454.21	Rs. 720.96
(c) Metal fittings such as Tap and Valves	Rs. 171.00	Rs. 171.00
Total Cost (a) + (b) + (c)	Rs. 625.21	Rs. 891.96
(d) Savings:		
(i) In cost of pipes, fittings and labour charges	Rs. 720.96 — Rs. 454.21	
	Rs. 266.75 or 37%	
(ii) In total cost of the installation	Rs. 891.96 — Rs. 625.21	
	Rs. 266.75 or 29.9%	

And remember, that apart from the initial saving, you also
save substantially over the years because PVC pipes need no
maintenance, do not corrode and retain their internal bore.

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own with the use of PVC pipes. For instance, a 4" cast-iron pipe is quoted at Rs 23 per metre, but for a PVC pipe the cost is hardly Rs 13.60 per metre. The delivery time for PVC pipes is so much shorter than that for galvanised or cast-iron pipes.

The PVC pipes are stated to be nearly one-sixth of the weight of the conventional pipes. They are, therefore, easier to handle and install. This ensures considerable savings in transportation, handling and installation costs.

One of the major considerations in installing pipelines is the ability of the pipeline to resist corrosion and contamination. PVC

pipes have elastic properties and their resistance to deformation resulting from earth movements is superior compared to conventional pipe materials. The maintenance costs of the PVC pipes are lower than for conventional materials. These pipes do not rust and have a good outdoor weather performance.

The PVC manufacturers contend that more use of PVC pipes could lead to savings in import costs. Each conventional piping material has an import component either in its manufacture or in its installation. Asbestos cement pressure pipes require imported asbestos fibre. Galvanised pipes require zinc for galvanising, and cast-iron pipes require lead for making joints. At times indigenous

production of steel is not sufficient to meet the country's demands warranting import of steel for the manufacture of galvanised pipes. For the PVC pipes no import of any material is involved. Polyvinyl Chloride is indigenously produced. The raw material is adequate to meet the demands of the pipe manufacturers.

PVC pipes are also exchange-earners. This is significant in view of the fact that the production of PVC pipes commenced only five years ago. There is a big market in West Asia for these pipes as the public health authorities in some of the countries have approved PVC pipes for installation in water supply schemes. Recently for installation of a

pipeline in a West Asian country, the UK firm which was entrusted with the job invited collaboration from an Indian manufacturer for supply of pipes. This only shows that the quality and the prices of Indian PVC pipes compare favourably with those manufactured in the West.

There is no doubt that PVC pipes will be playing a more important role in the water supply schemes in the country. It has been estimated that it will cost about Rs 1,200 crores to provide water supply and sewage facilities to the entire population. With the increase in the cost of conventional piping material, there is greater scope for PVC pipes. □

Major manufacturers

Steel pipes and fittings

Bengal Iron Works (P) Ltd, Ganesh Chandra Avenue, Calcutta.

Bihar National Engg Works, Patna Rd, Ranchi.

Bharat Steel Tubes Ltd, 17, Parliament Street, New Delhi-1.

Calcutta Steel & Metals Pvt Ltd, 22 Canning St, Calcutta.

Great Eastern Mechanical Works Ltd, Ichapore Rd, Mantragachi, Howrah.

Guest Keen Williams Ltd, Andul Road, Shalimar, Howrah.

Howrah Engg & Galvanizing Works, 68 Banaras Road, Howrah.

India Tube Mills & Metals Industries Pvt Ltd, 126, Narayan Dhuru St, Bombay.

Indian Iron & Steel Co Ltd, Mission Row, Calcutta.

Indian Tube Co (1935) Ltd, Chowringhee Road, Calcutta.

India Watertap Mfg, 5, R. S. Tagla Lane, Calcutta-2.

J. K. Steel Ltd, 7, Council House Street, Calcutta.

Khandelwal Tubes Pvt Ltd,

Khandelwal Bhavan, D. N. Road, Bombay-1.

Metal and Alloys Industries, Udyognagar, Tinsukhia.

Metal Trust (P) Ltd, 19, Maharshi Debendra Road, Calcutta-7.

Serampore Industries Pvt Ltd, Serampore (West Bengal).

Star Sheet Metal Works (P) Ltd, 1B, Jadu Mitra Lane, Calcutta-4.

Steel Fittings Mfg Co Pvt Ltd, 67-B, Netaji Subhas Road, Calcutta.

Supernova Steel Pipe Industries, 29-A-34, Piru Lane, Bombay-9.

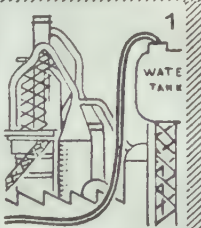

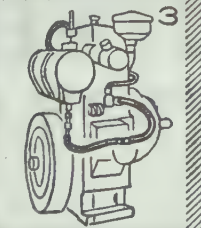
PVC pipes and fittings

Ahmedabad Manufacturing & Calico Printing Co Ltd, Anik Chambers, Bombay.

Chemicals & Plastics (I) Ltd, Dhun Building, 175/1, Mount Road, Madras.

Garware Plastics (P) Ltd, 135, Dr Annie Besant Road, Worli, Bombay-18.

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Growth of air cargo

— A FEATURE

An aid for exports

By Eric Pereira

THERE is a tribe in the South Seas or somewhere, who believe that all the material wealth of our affluent society comes from the cargo inside the bellies of the silver birds coming in from the white man's ju-ju land. They give practical demonstration to this belief by setting up totems to entice the bulging birds to disgorge some of the loot in the village clearing.

For us the cargo space of our national airlines is important. The cargo space provided by Air-India on its worldwide network is in fact part of our country's resources.

In today's concept, we must export to survive. Our Prime Minister has said that self-reliance is a possibility, and the mood of our nation is ready to achieve it. We cannot, however, hope to achieve any degree of self-reliance without our exports.

We must, therefore, maximise our earnings of foreign exchange, and we do this only when we use our national carrier for our air exports and thereby save foreign exchange.

Air-India, as the national carrier, is not unmindful of its responsibility towards the promotion of our country's exports. From time to time, the exports of various commodities have been promoted and low commodity

rates introduced, which have made us competitive in world markets.

The introduction of these rates, in the normal course, has to be through the IATA machinery. IATA is the association of the international airlines. Cargo rates can be filed by any carrier for a specific commodity. The rates become effective if they have the unanimous approval of all the other member-airlines. Unfortunately, what very often happens is that, the interest of one airline or its national interest may clash with the interest of the carrier filing the specific commodity rates, with the result that the rates are protested and cannot become effective. While the IATA rate fixing machinery is cumbersome and has its shortcomings, it is the only method by which the international airline rates can be fixed. The alternative would be bilateral agreements between the countries concerned and this would be far more cumbersome and difficult.

The markets of Europe are even further away from our country when we think in terms of surface transportation. Because of this, many of our exporters have begun to depend on air transportation. However, it is not possible to compare the surface transportation rates with air freight. The two concepts are completely different. In the first place, sea transportation today takes anything from six to eight weeks from India

to Europe. On the other hand, with air transportation, the goods, in most cases, reach their destination within 48 hours. There are other savings apart from time. There are savings in packing, in insurance, in warehousing costs and savings in inventories. Therefore, if air transportation cost has to be compared with sea or surface transportation cost, one must use the total cost concept, that is, take into account all the various economies that are possible with air transportation. If this is done in most cases, air transportation does become a possibility for our exports.

So far, a large proportion of the air cargo we carry is still

only cargo which is of an urgent nature. We must broaden the base; we must think of other commodities for air transportation which, in relation to their value or f.o.b. cost, can stand air freight charges.

Apart from perishables like fruits and vegetables, the importer today expects even commodities like shoes and garments to arrive in what he now calls 'factory-fresh' condition.

As mentioned earlier, we need our exports for our survival. We have therefore got to pay far more attention to our export promotion and marketing. We must not hesitate to use air transportation if it helps with our exports.

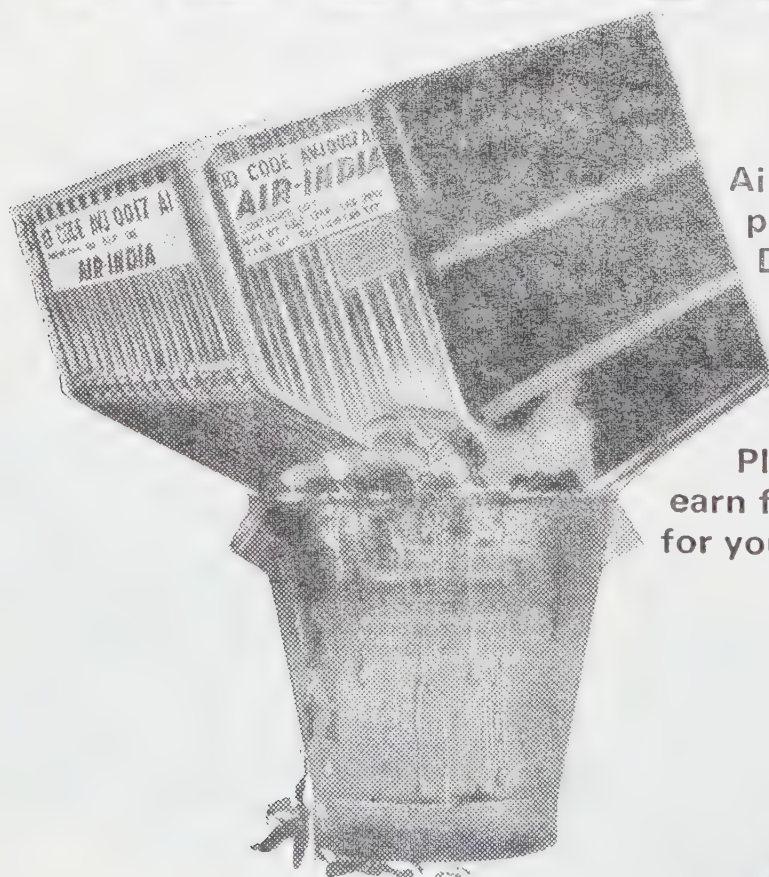
A number of our small-scale industries produce high labour intensive exports like handicrafts and silks which



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and a ready market in Europe. The snob value of these items is accentuated because of the price. Some of these commodities we cannot afford to sell in the markets of Europe for daily utilitarian purposes. They have to be sold to restrictive buyers who appreciate their value in terms of their cost. To explain, it is quite easy today for Europe to produce machine-made carpets which may even be of better quality and more durable than our handmade carpets. Still, our handmade carpets continue to enjoy a prestige well above that of machine-made carpets and therefore can attract a higher price and a satisfactory demand.

If the prices of commodities such as silks, handmade carpets and ivory statues, are drastically reduced, we would also lose some of our markets as these commodities lose their snob appeal. For example, if French perfumes were available at very low prices, few people would really be interested in them. Today, the French perfume or French Champagne, Russian Caviar, to a large extent, maintain their appeal because of the high prices.

On the same lines, when we plan our export promotion and marketing, we must realise that it is not only the lowest price which will be competitive. If we maintain the quality in our products, if we keep to our delivery schedules, if we anticipate correctly the changing fashions and requirements of the markets, and plan our production correctly, we can increase our exports and these exports can bear air freight rates.

The air transportation must form a part of the entire export promotion and marketing strategy of the organisation. The marketing manager must re-organise his whole distribution plan and carefully analyse his costing on packaging and inventories and his delivery dates.

It is not easy for organisations used to exporting by surface transportation to revolutionise their thinking and now switch over to air transportation. In many cases, they react immediately to the high cost of air freight. This reaction is due to the fact that the comparison is made of merely the air freight rate per kilo or per cubic foot

Aerodromes in India

I. International aerodromes

Bombay, Calcutta, Delhi, and Madras.

II. Major aerodromes

Agartala, Ahmedabad, Amritsar, Begumpet, Delhi (Safdar Jung), Gauhati, Jaipur, Lucknow, Nagpur, Patna and Tiruchirapalli.

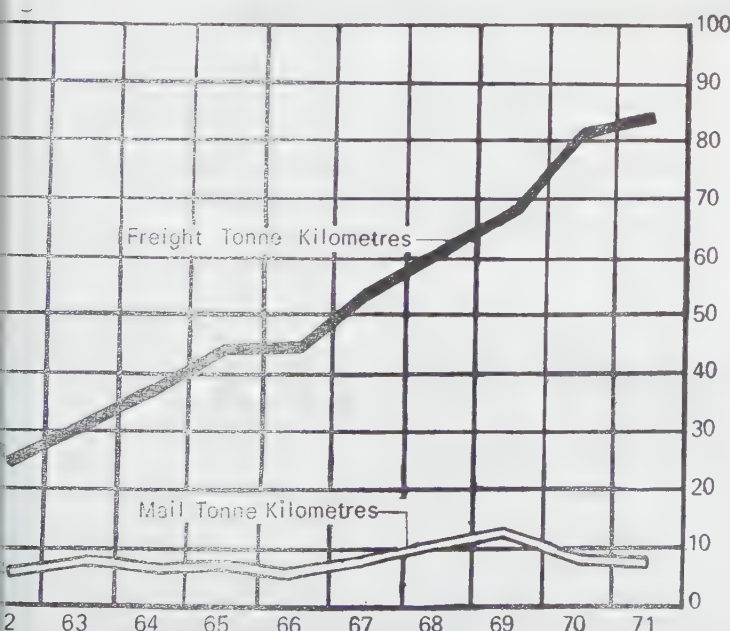
III. Intermediate aerodromes

Aurangabad, Balurghat, Baroda, Behala, Belgaum, Bhavnagar, Bhuntar (Kulu), Bhopal, Bhubaneswar, Bhuj, Bombay (Juhu), Coimbatore, Gaya, Indore, Junagadh (Keshod), Kailashahar, Kamalpur, Kandla, Khajuraho, Khowai, Kota, Kumbhigram, Madurai, Mangalore (Bajpe), Mohanbari, Nagagul (Nadargul), Gliderdrome (Hyderabad), North Lakhimpur (Lilabari), Pantnagar (Phoolbagh), Porbandar, Port Blair, Rajkot, Ranchi, Trivandrum, Tulihal (Imphal), Udaipur, Varanasi (Banaras), Vijayawada and Visakhapatnam.

IV. Minor aerodromes

Akola, Bilaspur, Chakulia, Cooch-Behar, Cuddappah, Donakonda, Hadapsar (Gliderdrome, Poona), Jhansi, Harsuguda, Jabalpur, Kanpur (Civil), Khandwa, Kolhapur, Lalitpur, Malda, Muzaffarpur (Rewaghat), Mysore, Palanpur (Deesa), Panagarh, Panna, Passighat, Raipur, Rajahmundry, Ramnad, Raxaul, Rupsi, Satna, Shella, Sholapur, Tanjore, Vellore, Warangal.

Mail and freight tonne kilometres
grown by Air-India
tonne kilometres (million)



with the sea freight rates. On account of this, so far, only a very small portion of approximately 4 to 5 per cent of our total exports move by air and most of these consist of cargo which is needed urgently. The intention is not of merely to transfer our sea or surface exports to the airlines. This becomes a worthwhile exercise only if by doing this, we can increase our exports. If the customer is happy by getting his goods on time and in, what has been referred to earlier as, 'factory-fresh' condition, we can expect repeat orders and boost our exports.

Labour cost is increasing throughout the world, more so in the US and the West European countries, which are important market areas for us. With the high labour cost involved, many importers are now anxious that their goods are received straight from the factory to their showroom, without incurring additional expenditure on un-

packing, cleaning and for the preparation of the goods for display. For example, in the case of garments, the importers expect to receive the garments from the aircraft and display them in the showroom without pressing.

Therefore, once the importer and exporter realises fully and completely the various savings that air transportation has to offer, they appreciate the benefits and begin to realise that the total cost when exporting by air can become comparable with the total cost of surface transportation. Already today most commodities which are charged for sea transportation on an *ad valorem* basis, can easily bear air freight rates and most of these commodities have begun to move by air. We must realise that under the present circumstances when we have to rely less and less on foreign aid, we can only do so by increasing our exports and our foreign exchange earnings. □



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Need to utilise potential

By A Special Correspondent

OUR efforts to plug loopholes in the drain of foreign exchange seem to be half-hearted. This is the only conclusion one can derive from the scant attention paid to the drain caused by transport of air cargo to and from India by carriers from abroad. A surprising aspect of this is that some of the public sector organisations like the State Trading Corporation invite tenders for air transport of goods in which foreign airlines not only participate but participate successfully against Air-India.

The practice of inviting tenders for air cargo is a relic of the past which continues because of the inability of some quarters in the public sector organisations or the government to adapt to new situations. The past practice is continued unmindful of the repercussions on the interests of this country. This is in contrast to the attitude of foreign governments which ensure that not only products of their domestic industries are bought against tied credits but also that these goods are transported by carriers named by them. Needless to say that in the case of air cargo the foreign parties choose the airlines belonging to their country.

The contention that tenders are invited to cut down costs is fallacious. The freight rates are standard rates. In any case if the rates are high the Union government is there to interfere. It can direct Air-India—the national air carrier—to cut down the rates or to charge certain rates as was done in the case of transport of goods to Bangladesh recently. In any

case it should not be difficult for the government to set up a machinery which can go into the question of the air freight rates in respect of items which the public sector organisations consider high. Air-India is not insensitive to the needs of promoting air cargo by freight rates concessions. It has introduced a number of commodity rates between India and overseas destinations.

This is not to suggest that we should not make use of the facilities made available by foreign carriers. That would be an unworkable idea. But if foreign governments and suppliers, as a matter of policy, patronise their own national lines, there is nothing wrong in our pursuing the same type of policy. If New Delhi, for instance, can encourage travel by Air-India by giving certain concessions without causing a murmur, there is no reason to fear that purposeful patronisation of the national airline for the transport of cargo would lead to any protests.

This apart, though air transport of cargo is growing, there is as yet inadequate awareness among businessmen and industrialists of its potential benefits. There is sound economics in the import by air and some high priced raw materials. The inventory holding is becoming costly with interest rates ranging from 10 to 12 per cent or above. In some cases the inventory build up for imported raw materials is of three to six months duration. With air cargo facility the inventory holding can be reduced to a period of hardly two weeks. This would also increase the capacity of the

importers to purchase goods according to their choice. Fresh goods can be imported. There would be more choice for the local importers in the case of new arrivals in the markets abroad.

On the export front also there are items where the air transport potential needs to be utilised more fully. The commodities currently exported by air include handicrafts carpets, rugs, fruits, vegetables, meat, readymade garments, leather goods, sandalwood oil, jewellery and gramophone parts. An encouraging trend is that new commodities and items are entering the air cargo list. Machine tools, automobile parts, transistor radios, data processing machinery, electronic equipment and components and IBM machines are some of these items.

Because of the high cost of storage in foreign countries, the foreign buyers want to import the goods from here in a quantity that does not add up to the selling costs. In the case of readymade garments for Christmas sales the foreign importers prefer air transport rather than sea voyages which take at least four weeks. The air cargo goods are there in the departmental store in London within 48 hours of leaving the factory in Bombay or Calcutta.

It is in this context that the Operations Research Group, Baroda, in its survey of overseas transport and freight structure observed that air cargo costs are relatively high per unit of the weight, but when the gains from speed for whatever reasons are high and when simplified packing and relative freedom from pilferage are important, air transport may be the most economic form of transport.

There are of course limits to the extent to which commodities can bear the higher costs. The percentage ratio of air freight to f.o.b. value is the appropriate measure in assessing those limits. There is also a view that air freight costs have to be taken into account in the context of total costs. But the time factor can also be quite important for importer here or abroad. This is particularly so when not merely consumer goods but raw materials and equipment for plants are involved. Factory stoppages on account of lack of specialised components and parts in the local market can be reduced with import by air.

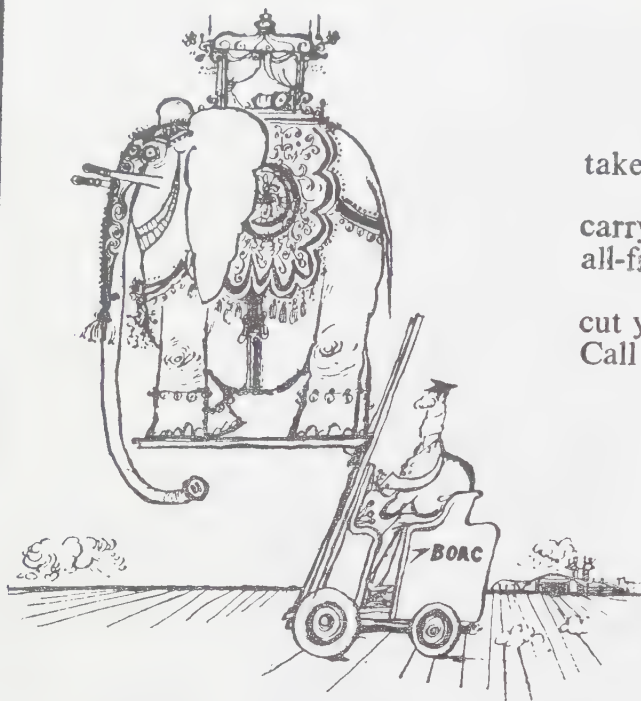
Air-India accounts for nearly 60 per cent of the air cargo movement from and to India. According to the survey by the Operations Research Group completed

Trend of cargo carried by domestic services

Year	Hours flown	Kilo-metres flown	Freight carried (tonnes)	Mail carried (tonnes)	Capacity tonne kilo-metres offered	Revenue tonne kilo-metres flown
	Number	Thousands			Thousands	
1959 ..	131,397	39,817	33,504	6,825	197,754	125,277
1960 ..	133,648	41,424	38,206	6,817	242,869	146,067
1961 ..	138,450	44,380	40,070	7,534	313,694	170,249
1962 ..	131,705	45,204	37,704	8,158	358,127	191,737
1963 ..	129,305	46,904	37,746	9,101	399,933	220,260
1964 ..	126,852	49,024	32,516	9,977	449,725	254,607
1965 ..	120,642	47,986	26,334	10,524	465,585	262,065
1966 ..	124,257	49,782	21,259	10,512	476,566	272,205
1967 ..	131,144	56,087	23,693	11,185	590,909	316,507
1968 ..	135,425	60,047	25,394	11,691	636,346	353,263
1969 ..	150,483	66,559	31,915	12,162	702,216	408,057
1970 ..	147,728	65,691	32,637	11,896	709,230	438,988
1971* ..	123,414	57,004	28,494	10,282	726,370	406,650

* Estimated.

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two years ago nearly per cent of India's exports move by air. The share is less than two per cent in the case of imports. In export, Bombay airport accounts for nearly 60 per cent of cargo handled by Madras, Calcutta and Delhi.

The inward and outward movement of air cargo including mail by Air-India amounts to about 1.5 million tonnes per month. Air-India has 10 flights per week. Trans-shipment of export cargo by Air-India amounted to 52.8 lakh kg in 1970 which rose to 63.6 lakh kg in 1971. The growth of export cargo by Air-India was higher than the growth rate of exports by the other airlines. During the last period import cargo movement increased from 36 lakh kg to 46.3 lakh kg.

Some of the exporters have complained of reduction in cargo freight rates. The Government, however, contends that these rates have been determined on the basis of economic operations of the airlines and on the basis of what the traffic can bear. In any case reduction in freight rates may not improve the ability of the local airlines to compete in the

markets abroad to any significant extent. Effort has to be made to augment the foreign exchange earnings through services like transport and insurance.

Efforts are being made by Air-India as also the air cargo agents to improve the movement of cargo. The shippers and cargo agents are critical of the procedural delays by the customs authorities. For instance, in the case of a shipment of prefabricated mica to the US from Calcutta the shipment was cancelled by the customs authorities on the technical ground that the export licence had expired owing to flight delay. The result was that all the documents were sent again to the authorities concerned and it took two days more to airlift the goods. The government must pay more attention to eliminating such delays which can prove quite costly to our export efforts.

There have been recently two significant instances which highlight the ability of our national carrier to carry cargo of any nature. Two weeks ago, Air-India flew two Gnats and one Kiran aircraft by a special

flight of the 707 plane for the forthcoming Farnborough show in the UK. This is for the first time that an Asian country is participating in the show. The exhibits were transported in knocked down condition but there were many problems of loading. Answers had to be found to the concentrated weight and extreme dimensions of the planes. The job was completed within a short time though at one stage it was thought that the task might be impossible.

Another instance was the bringing in of some urgently needed equipment for the Tarapur atomic power station in May this year. Three pieces of 11 tonnes each and three pieces of five to six tonnes each were brought in two flights from Chicago.

Air-India is building up its capacity as a cargo carrier through facilities such as palletised cargo operations. It has expanded its cargo warehousing facilities at Bombay, London and New York airports.

The transport of air cargo is not only for overseas destinations but also in domestic sphere needs to be encouraged.

The fact that the country has got a network of four international aerodromes, 10 major aerodromes, 38 intermediate aerodromes, and 32 minor aerodromes is indicative of the expansion in civil aviation facilities in the country.

Despite the fact that the number of aerodromes and the planes and services of the domestic airlines are increasing, it is surprising that the freight carried by the Indian Airlines is going down. From 40,000 tonnes in 1961, it came down to 28,494 tonnes in 1971. This needs to be properly looked into by the IAC. The frequent strikes by the airline's workers resulting in cancellation of flights could have been one of the causes for decline in the freight. Businessmen could not be blamed if they did not utilise the domestic air transport more because of uncertainty in its operations. There may be also other reasons such as the freight rates charged or facilities made available by the IAC. Or is it that an assured fast-growing passenger traffic makes the IAC ignore air cargo? Or is it that it has not adequate fleet to pay greater attention to this side of business? □

Air cargo agencies

Freight Private Ltd, 10, Le House, Nicol Road, Fort Estate, Bombay.

American Express International Banking Corporation, Wenger House, Connaught Place, New Delhi.

Atlantic Travel Service, P. O. Box 1568, 12 Murzban Road, Fort, Bombay.

Becker & Co Private Ltd, Grand Road, Calcutta.

Continental Carriers, 37-H, Regent Circus, New

Delhi. Cook & Son (C & O) Private Ltd, P. O. Box 171, 4/5 First Street, Beach, George Town, Madras.

De & Kings (Agents) Ltd,

Lloyds Bank Building, Bombay.

Freight Carriers Private Ltd, 43 Tamarind Lane, Bombay.

Gordon Woodroffe & Co (Madras) Private Ltd, 1/21 North Beach Road, Madras.

Govan Travels (Cargo Division), 4 Todarmal Lane, New Delhi.

Happy Travels Private Ltd, Century Bhavan, Dr Annie Besant Road, Worli, Bombay.

F. W. Heilgers & Co (Private) Ltd, 1 India Exchange Place, Calcutta.

Jeena & Co, 10 Veer Nariman Road, P. O. Box 849, Bombay.

Lee & Muirhead (India) Private Ltd, 12 Rampart Row, Fort, Bombay.

Mackinnon Mackenzie & Co Private Ltd, also trading as Pandair Freight, 16 Strand Road, Calcutta.

Manilal Patel & Co, Kamar Building, 38 Cawasji Patel Street, Fort, Bombay.

Mercury Travels (India) Ltd, Grd. Floor, Jeevan Tara Building, Parliament Street, New Delhi.

Patel Volkart Limited, 19 Graham Road, Ballard Estate, Bombay.

Peirce Leslie India Ltd, P. O. Box 565, Bristow Road, Willingdon Island, Cochin.

S.O.T.C. Travels & Tours, 44 Mint Road, Bombay.

Sanghi Travels, 7-E Jhandewala Extension, New Delhi-55.

Shipping & Clearing (Agents) Private Ltd, Great Eastern Hotel Arcade, 1, 2 & 3 Old Court House Street, Calcutta.

Sinclair Freight & Chartering Consultants Private Ltd, Wellesley House, 7 Wellesley Place, Calcutta.

Sita World Travel (India) Private Ltd, F/12 Connaught Place, New Delhi.

Skylark Travels Private Ltd, 114 Sahid Bhagatsingh Road, Colaba, Bombay 5.

Trade Wings Private Ltd, 30 Rampart Row, Fort, Bombay.

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Entertainment electronics

— A FEATURE

Marketing of radio receivers

R. R. Mahadeshwar

INDIA is on the threshold of vast and momentous experiments in the field of electronics. A stage has now been reached when the selling market in which the electronics industry and trade have registered remarkable progress all these years, is opening into a buyers' market.

The production by the manufacturers in the small-scale sector as well as the large sector has gone up by leaps and bounds, but demand for radios has not increased in proportion to production. The buyers are now becoming choosy.

In this era of rapid technological developments, a close study of the practices obtaining in this country and the correct idea of future trends are required for successful marketing. Nobody today can deny the fact that marketing on modern lines is essential if the industry is to grow further.

It is a common requirement of the marketing people to know the market needs for particular types of radio receivers and to satisfy those needs with timely, well-conceived, well-built and attractively priced receivers.

An important aspect of marketing is the need to study the customer psychology. With the exception of a few radio buyers from the rural areas, the majority of

them belong to the educated class and possess sufficient knowledge of everything connected with our this sophisticated product. Gone are the days when a radio could easily be sold on recommendation and persuasion. Market people would, therefore, do well to get detailed first-hand information relating to customer preferences, knowledge of customer reactions and the selling experience of the dealers and consolidate the information thus gathered from different sources and furnish it to the development section with a view to ensuring that the product is (i) based on trouble-free circuit and design and is in keeping with the latest developments in the industry; (ii) attractive and acceptable in appearance and (iii) competitive.

It must be noted that a pivotal role has to be played by the marketing people. The customer generally does not happen to know about the manufacturer. It is the marketing man in whom he fully reposes his confidence. It is, therefore, important for the marketing people to see that distribution channels at all levels faithfully guard this confidence.

The advertising agencies in this country have been using marketing research as a basis for developing and executing advertisers' campaigns. Consumer surveys, of course, form a basic foundation for such a campaign. In recent years, studies of advertising media include surveys of audiences reached by var-

ious income, age or other groups, geographic and city size coverage. In examining the export market, it would be most useful if international co-operation to some extent could be established in view of the fact that markets and marketing will differ from country to country.

The companies embarking upon export programmes would do well not to ignore this difference. There is a great scope for Indian electronic products in several foreign markets and the Export Credit and Guarantee Corporation as well as the Engineering Export Promotion Council have been playing important roles in

furnishing information about foreign buyers and governmental policies of different countries. It is to be hoped that the Indian exporters will take full advantage of these opportunities.

There is also wide scope for marketing consumer goods in the rural areas. The marketing people would do well to go to the villages in the interior and tap new unexplored fields by educating the people in the modern advanced methods and their utility with the aid of effective publicity, attractive advertisements and frequent demonstrations.

Today, radio is the only means of recreation for the villagers and with the advent of transistor radios, those who have financial resources will cheerfully buy transistor radios. Besides, buying

Growth of the radio receiver industry

('000 numbers)

Year					Capacity	Production	Percentage utilisation of capacity ($4=3/2 \times 100$)
1					2	3	4
1960	..	..	..	..	279.2	268.3	96.1
1961	..	..	..	..	279.2	326.3	116.9
1962	..	..	..	..	332.3	343.3	103.3
1963	..	..	..	..	390.3	418.1	107.1
1964	..	..	..	..	360.3	472.7	121.1
1965	..	..	..	..	391.5	583.4	123.5
1966	..	..	..	..	492.5	712.6	144.7
1967	..	..	..	..	550.5	854.1	155.1
1968	..	..	..	..	798.8	1,368.8	171.3
1969	..	..	..	..	1,214.8	1,735.5	142.9
1970	..	..	..	..	2,330.0	1,774.0	76.1
1971	..	..	..	..	2,330.0	1,949.7	83.7
Annual compound rate of growth between 1960 and 1971 ..					21.3	19.7	—

NOTE: Data pertain to the organised sector only.
SOURCE: Central Statistical Organisation, *Monthly Statistics of the Production of Selected Industries of India*, November and December 1968, Vol. XX, Nos. 11 and 12, and January and February 1969, Vol. XXI, Nos. 1 and 2, and various issues, Calcutta.

R. Mahadeshwar is on the staff of Electronic Digest, official organ of the All India Radio & Electronics Association.

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bits of the people have undergone a remarkable transformation.

The marketing people could chalk out programmes for visiting the surrounding villages at least once a month, with a view to establishing personal contacts with the villagers.

Audio-visual publicity will help popularise radios in rural areas where the bulk of

the population is illiterate. Screening of films and slides in touring cinemas will be useful in popularising the product and making the villagers radio-minded.

The marketing people have the responsibility of discovering today the needs of the people for tomorrow so that production of consumer goods could be developed accordingly. □

underdeveloped. Besides, there were more pressing basic problems confronting the average family which would think twice before purchasing a radio set. Fortunately, this situation has considerably changed and at least the middle class people now have a set of their own.

With the invention of the tiny capsule called the 'transistor' the portable battery-operated transistor sets have become very popular during the past five years. This is a real boon to a country like India, where electricity is yet to reach many of her villages.

Though the actual cost of production (material-wise) is very low for transistorised receiving sets, India is yet to produce a stable and rugged transistor set with a good coverage for less than Rs 100, which should be quite feasible with the available resources and talents. The main drawback of this industry is the chain of tradesmen involved in retail distribution. They are so many and varied that the manufacturer thinks that he has to have margin to cover all the links in the chain. Further, the industry banks so much on foreign collaborators who want to make quick profit at as high a rate as possible, that the initial pricing itself is quite high. The purely indigenous manufacturer is not interested in availing of the services of the really talented and qualified electronics engineer since he has not got the foresight to view the things on a long-term basis. Many young enthusiastic electronics engineers in India have no place to serve this

PROFILE

Radio receivers industry

THE production of radio receivers showed a rapid rise after the Second Plan. In 1956, there were 15 manufacturers in the organised sector with a total installed capacity of two lakh sets per year, manufacturing 1.02 lakh sets a year. The restrictive import policy and the subsequent ban on imports of radio receivers gave a fillip to the development of the indigenous industry. Within a period of five years, the production touched a level of 2.80 lakh sets a year. Between 1960 and 1971, the capacity and production in the organised sector recorded an annual compound rate of growth of 21.3 per cent and 19.7 per cent respectively. The capacity in the organised sector is estimated at 23.30 lakhs and production 19.49 lakhs. For the past three years, the production has been somewhat stagnant. The production in the small sector is placed at about seven lakh sets per year.

According to the industry, today, one out of every 40 persons owns a radio set whereas a decade ago only one out of every 200 could afford that luxury. With the green revolution and flow of more funds to the rural areas, a vast potential has developed in that area. But the rural population can only afford low-priced sets. The demand of the rural family is for a simple, cheap, single-band medium-wave set which can receive popular programmes clearly. Therefore the industry has to lay emphasis on the improvement in the efficiency of the product and on reducing production costs. It is also necessary for All India Radio to have more powerful transmitters and to widen the range of its programmes.

India has achieved near self-sufficiency in radio components. The import content is claimed to be about Rs 1 per radio as against Rs 50 a decade ago. Sophisticated components such as gang condensers, valves and switches are also being produced in this country. There are about 1,200 ancillary units in the small sector supported by the radio industry.

The organised sector of the industry is perturbed by the steep rise in the excise on high-priced receiver sets. The excise duty for receiver sets of less than Rs 165 has gone up from Rs 10 to Rs 12 this year. For sets priced between Rs 576 and Rs 675, the excise duty has been increased from Rs 120 to Rs 160. For radio sets priced above Rs 676, the excise has been increased from Rs 133.33 to Rs 200. The manufacturers contend that this industry is one of the few where a relative measure of price stability has been obtaining all these years. Sales in high-priced categories which have been at a stagnation point are said to have slumped further.

Radios and transistors made in India are becoming popular in African, East European and Persian Gulf countries. The exports of radios and transistors are currently of the order of Rs 1 crore. There is no doubt that Indian radio technology has reached more or less a level where it can compete with international standards. But to improve its present performance the quality of the radio, particularly its finish, needs to be improved.

Unhealthy reliance on foreign know-how

By G. K. Sanker

WHEN India won her independence there were hardly 15 broadcasting stations in this country and many of them were not very popular. The people were not radio-minded, and the costs of domestic radio receiving sets were prohibitively high for the common man. Radio sets were mainly imported. Added to this, the puritanical policy of the Ministry of Information and Broadcasting was such that many of the broadcasting stations which were set up with higher-powered transmitters under the five year plans, were not catering to the taste of the large majority of the masses. Hence this entertainment medium was not effective.

There were one or two foreign stations to which people mostly tuned and listened at the duration of their broadcasting in the Indian languages being so very limited, this also did not inculcate the habit of listening in the people. Against these odds, the industry had to find sales outlets in a country economically

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country, and hence they go abroad where they do well. In most of the cases the jobs are not lucrative to attract talent and this state of affairs should be removed at all costs.

The industry has attained a stage now wherein with its 10 years of experience in making components as well as in assembling, mainly domestic broadcast receivers, must be able to stand on its own legs without excessively leaning on foreign technical know-how. In this respect it will be beneficial to follow the footsteps of Japan which has achieved remarkable results in the field of manufacturing domestic electronic equipment for entertainment as well as various other sundry electronic software. Unfortunately there is pre-lent among the people of this country, a wrong notion which may be termed as 'diffidence' in the technical competence of our engineers and

technologists. This attitude should change. Our entrepreneurs must come forward to set apart a section of their profit which is to be mainly spent on developmental work.

There should also be a complete revision of the system of education in radio and electronics technology for instance, the syllabus and educational objectives laid down in IIT and other colleges are far above the requirements of the industry. After completing their training programmes students are found unfit for the electronic industry in this country and so they go abroad to seek jobs.

On an average over 30,000 radio-cum-cassette recorders are smuggled into this country every year, even though without spare parts, maintenance of such units here is impossible. In the interest of consumers smuggled radios should also be confiscated, like tape-recorders, to give

protection to the radio industry.

Moreover a real talent search and encouragement from the industrialists is essential. If it is necessary to send persons abroad it must be done. Though the industrialist will always think in terms of securing a reasonable return on the money that he has invested, which is human and natural, he should also think in terms of the quality in product that he is giving the masses, who are unfortunately left with no alternative but to buy anything that is produced in this country owing to import restrictions.

In those cases where there are foreign collaborators, it must be seen that the importance of the collaboration agreement is minimised. Better still, collaboration should be completely terminated when the agreement comes to an end. When this is done it should be borne

in mind that the basic machinery and equipment that are necessary to produce the hardware and software must also be indigenously manufactured. This will help various ancillary industries also. This is mainly the problem of mechanical engineers who manufacture mother machinery that go to help production of other machines. To achieve this there should be real co-ordination between the industry and the scientific institutions. The engineers themselves must have an understanding of various disciplines, and this interdisciplinary approach should be a part of that training. A word of caution to the technologists and engineers: They must bear in mind the soil in which they are working and the drawbacks that they have to face collectively and individually. Whatever resources are set apart for technological research must be used very effectively so that the results will help this country. □

Entry into sophisticated fields

By H. S. Bhatti

SHORTLY after independence, the foundations of the radio receiver industry were laid, per force owing to lack of technological know-how, with the collaboration of foreign manufacturers. What should have been a transitory arrangement, lengthened out to 20 years, during which no indigenous innovation or development was possible. This, in historical perspective, is one of the important causes which stunted the growth of our electronic industry.

With a handful of large sector companies monopolising

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ing the radio field, prices of radios remained high; in fact an average radio was priced above the annual *per capita* income of an Indian during these two decades. It was the advent of the small-scale industry around 1960, which helped to radically change

the situation by providing the necessary competition. Small and medium industries have generally been based on indigenous skills and locally-made components. The paucity of import licences and discrimination against these two sectors in regard to imports compelled them to resort increasingly to local sources of supply. This indirectly gave encouragement to the development of the indigenous component industry.

By 1965-66, the small industry rose to be a major producer of radios in the country accounting for a share of 55

per cent of the aggregate production. Subsequently, the favoured treatment shown to larger units by official agencies resulted in a backlash which literally stopped the growth of the indigenous radio receiver industry and finally put it into disarray. These are historical tragedies in the growth of the consumer electronic industry.

In recent years, the component industry has registered a fresh growth and kept in step with the requirements of the consumer industry at least. Other sectors such as defence electronics, telecommunications and specialised

Manufacture of electronic equipments and components

(In crores of rupees)

Year				Entertainment equipment	Defence equipment (BEL/HAL)	Communication	Other instruments, computers, etc.	Total equipment	Components	Total production (equipment and components)
1965-66	..	..	..	24.0	6.6	3.0	3.6	37.1	6.5	43.6
1968-69	..	..	..	48.0	21.3	4.7	11.0	85.0	21.0	106.0
1971-72	80.0	35.8	14.0	13.7	143.5	42.0	185.5
				(PLANNED)						
1974-75	225.0	60.0	20.0	55.0	360.0	105.0	465.0

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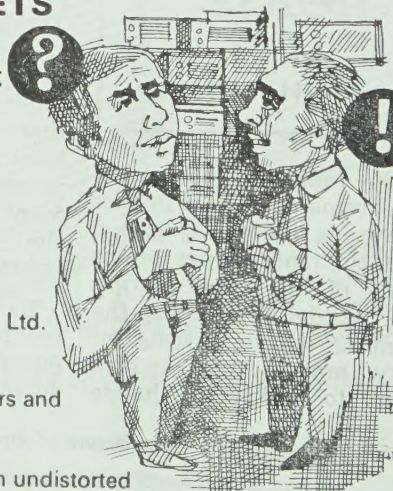
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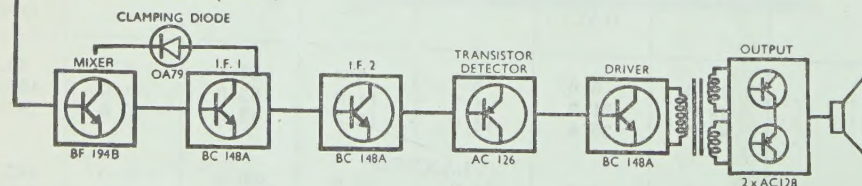


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ds like computers etc ve suffered from lags. It s the Bhabha Committee ich highlighted the need of t growth in these fields. plementation of expan- programmes has been dy in the critical fields. A d-term review in March '0 at the National Confer- ce of Electronics at Bom- y came to the conclusion at, while consumer electro- s registered a phenomenal owth, the key sectors lag- again. Perhaps, the for- tion of the Electronics mmission was a sequel to alisation of these defects.

When the commission took er, it was faced with a cision regarding the expan- n of the TV industry. The ge-scale radio manufact- ers, who had shunned dian know-how in the be- ginning and projected the

view that TV could only be produced with the so-called superior technology of foreign companies, were countered by the claims of CEERI, Pilani and the local small-scale industry which had tasted the bitter fruits flowing from foreign collaboration.

After a pragmatic analysis of all factors, the commission came to the conclusion that foreign companies should be excluded from the TV and consumer industries, and a major portion of production in TV, tape-recorders and stereos should be licensed to Indian companies, particularly those in the small sector. This policy marks a watershed in the Indian electronics industry and augurs well for its future growth which is expected to be very rapid. The accompanying table shows

the past and targeted future growth in various sectors.

It will be seen that the consumer electronics industry has registered a cumulative growth of nearly 30 per cent every year between 1965-66 and 1971-72. This is expected to improve during the next four years. Other sectors are picking up, more especially the field of computers in which once again we were unable to register fast progress owing to discriminatory agreements with foreign companies. The 1971 war has changed the perspective and the Electronics Commission has now turned to the USSR and East European countries for tie-ups in fields where we require collaboration. Two high-powered teams of scientists and technologists have recently returned from study tours and are expected to sub-

mit recommendations of far-reaching nature.

In the 25th year of independence, with a production of Rs 2,000 million per annum in electronics, India has moved on to a launching pad from where the take-off will be smooth. From radio which has become an ordinary appliance, the industry is graduating into sophisticated fields of TV and computers instead of importing we are now exporting radios and electronic equipment and the projected free trade zone at Santa Cruz in Bombay is aimed at generating export business of Rs 1,000 million per annum within two years of its establishment.

In sum, the electronic industry can truly boast of formidable achievements in 25 years since this country won its freedom. □

Problems of components industry

By N. J. Kite

HERE are not many manufacturers of good quality electronic components in our country at present. There can all be good reasons for this, for example, high capital investment that is necessary to produce large quantities of consistently high quality standards to world specifications and high capital equipment redundancy that is to be expected with the ever improving new technologies. These two factors alone underline the importance of very high production figures to ensure adequate capital return and to allow for possible obsolescence.

In India the component market for 2.5 million to 3

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million radios, say 100,000 TV sets in 1973, plus the professional and industrial field requirements does not provide very attractive production figures for the component manufacturers, particularly if the market is shared by many. Again, this may well be another reason why there is a shortage of good quality component manufacturers.

Yet if we look outside of India, the need for reasonably priced electronic components to international standards is enormous.

In most European countries and in the US, the cost of living has been rising steadily, with the result that the cost of production naturally, has, also increased, even though very high degrees of mechanisation have been employed. Particularly for

the entertainment markets such as TV, radios for home and for cars, Hi-Fi stereos and tape-recorders, where prices are a significant factor, most European countries and the US have for some time been increasing their demand for electronic components from the East. In fact many assembly units have been set up in the East for entertainment equipment to take advantage of cheaper components and cheaper assembly costs. The equipments are shipped direct to Western countries. In Singapore alone, approximately seven million radios are assembled, outside of tape recorders and TV sets. There are other areas like Taiwan and Hongkong which have developed, along the same lines. Vast quantities of components are needed in these various assembly areas, and Japan, Taiwan, Hongkong and South Korea are the main supply centres.

There is undoubtedly room in this large market requirement for India to participate. To enable our country to enter the export market in all types of electronic components in a significant way,

the following conditions are absolutely necessary. (1) The components to be exported must be of the type and of the right technology required by the world markets; (2) they must conform to world accepted quality standards, and must be rigidly quality controlled; and (3) they must be available at world export price levels, and the delivery dates strictly adhered to.

To achieve these objectives, the component manufacturer must be allowed certain facilities such as, (a) freedom to use the latest component technologies. If they are not available locally, he should be permitted to import the know-how; (b) freedom to import the latest technologically advanced manufacturing machinery; (c) easier expansion possibilities particularly where results prove the necessity; (d) easier strategic raw material import formalities; and (e) easier export formalities.

To do exports on a really large scale will require high capital investments and it would seem logical that those manufacturers, be they large, medium, or small-scale who are prepared to make such

investments should be invited to put up their project proposals to the government without delay.

If one assumes that only the larger manufacturers can make such high investments, then where can the small-scale manufacturers fit into the picture? Let us look at the Japanese system which has proven to be very successful. Here we see large manufacturers marketing through export houses. But these large manufacturers employ—and this is an important point—a very great number of small-scale supporters to make the raw materials and piece parts for the assembly of the final components. Most of the small-scale units in Japan have developed into medium and even large-scale ones just supporting those component manufacturers who have the expertise to make the final components and who have the knowledge in export marketing.

For the fastest advancement in any technological field, use has to be made of the best possible skills, know-how and enterprise. If a developing country wishes to attain these qualities all by itself it will take perhaps too long and in that period the rest of the world may well

have gone even further ahead, particularly in technology.

No country can be self-sufficient in brain-power or even in raw materials. Knowledge must be shared and pooled, and for us in the electronics industry if we are to

become a significant supplier base in India for world markets we have to utilise all the expertise available, be it local or foreign. The rewards possible can certainly show profitable and very high rate of industrial progress plus significant foreign exchange earnings.

India's exports of radio receivers

(Amount in '000 rupees)

Year	Domestic radio receiver sets		Transistor radio receiver sets		Other radio receiver sets (automobile)		Total	
	No.	Amount	No.	Amount	No.	Amount	No.	Amount
1968-69	214	39	5,994	809	104	10	6,312	858
1969-70	1,421	198	33,564	2,669	781	240	35,766	3,107
1970-71	11,736	962	1,01,806	7,901	227	27	1,13,769	8,890
April-November								
1970-71	11,733	962	46,650	3,517	49	13	58,432	4,492
1971-72	132	36	1,70,186	13,991	90	20	1,70,408	14,047

SOURCES: 1. Reply to unstarred question No. 13 in the Rajya Sabha on November 15, 1971.

2. Government of India, Department of Commercial Intelligence and Statistics, *Monthly Statistics of the Foreign Trade of India*, Vol. I, March 1971 and November 1971.

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